InBloom Shop Software v2.1

Setup and User Guide

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InBloomSoftware.com
SecretWeaponLabs.com

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Thank you to all the users, testers, and customers with their input, patience, and loyalty.

67.75, 63.5, 42, 39, 26, 24, 16, 10, 9, 6

TABLE OF **CONTENTS**

About InBloom 8

Mac Computer Requirements 10
PC Computer Requirements 10
Multi-User Requirements 10

Installing InBloom 11

Setting Up InBloom Lite On A Mac 12
Setting Up InBloom Lite On A PC 13
Setting Up InBloom Pro On A Mac 15
Setting Up InBloom Pro On A PC 17
Running The Install Process 19

Step 1 20
Step 2 21
Step 3 22
Step 4 24

Meet InBloom 28

The InBloom Main Menu 29
Some Basic Things 30

The Basics Of Inventory 32

Viewing Your Inventory 33

The Inventory Toolbar 33
The Search Field 34
The Inventory Footer 35

The Different Views Of Your Inventory 35

The Consignor Info View 36
The Consignment Entry View 39
The List View 41
The Item Details View 42

Consignors And Buyers Basics **44**
One Really Great Address Book 45
Digging Deeper Into Your Contacts 47
Point Of Sale 49
The Sale Confirmation Screen 50
The Sale Payment Screen 51

Logging In **53**
Logging In To InBloom 54
Logging In To InBloom Over A Network 55

Inventory **57**
Adding Inventory To A New Consignor 58
Adding Inventory To An Existing Consignor 59
Searching For Inventory 61
Deleting Inventory 62
Hiding Inventory 62
Printing & Emailing Inventory 63
The Different Printout Types 65
Marking Inventory As Returned To Consignor 67
Marking Inventory As Donated 69
Filtering: How To Show Only Available / Sold / Paid / Unpaid / Donated Items 70
Researching Inventory Prices Automagically 71
Easy Sorting & Visual Browsing 74
Capturing Inventory Information 74

Sales **78**
Writing Sales 79

Deleting & Voiding Sales 83
How To Email A Sales Receipt 84
Advanced Point Of Sale Functionality 84
Adding Customers To An Invoice 85
Adding Shipment Info To An Invoice 86
How To Write A Layaway Sale 87
Making Additional Layaway Payments 90
Returning Merchandise 92
Solution 1: Returning Items & Selling Items In A Mixed Transaction 93
Solution 2: Writing A Return-Only Transaction 94
Giving Customers Store Credit 95
Using Quick Add: Selling Items Before They're Inventoried 97
Looking Up Items During A Sale 98
Discounting Items When Writing A Sale 99
Discounting The Invoice 101
Discounting Selected Items 101
Adding Non-Inventory Items To A Sale 102

Managing Contacts: Your Buyers & Consignors 104
One Really Great Address Book 105
Browsing & Editing Contacts 107
Managing Your Contact Information 109
How To Find Contacts 110
Digging Deeper Into Your Contacts 111
The Additional Info Tab 111
The Invoices Tab 112
The Purchased Items Tab 113
The Payments & Credits Tab 113
The Alerts Tab 114
The Wishlist Tab 115
The Log Tab 115
Creating Customer Wishlists 116
Finding Customer Wishlist Matches 116
Printing Mailing Labels 117

Reports 118

Browsing & Running Reports 119
A Description Of Each InBloom Report 120

The InBloom Dashboard 121

Using The InBloom Dashboard 122
Filtering The Dashboard By Transaction Type 123
The Different Views Of The Dashboard 123

Payments 125

How To Pay Consignors 126
Step 1: Click Consignor Payments 126
Step 2: Perform The Search 127
Step 3: Auto-Calculate Consignor Payments 128
Step 4: Scan Through Pending Payments 128
Step 5: Issue The Payments 129
Printing Checks In InBloom 132
How To Print A List Of Pending Payments 134
Viewing Past Payments 135
Modifying Consignor Payments 136
Using InBloom With QuickBooks 137
Step 1: Install The QuickBooks Plugin 138
Step 2: Install the QBXMLRP2 file: 139
Step 3: Install the Microsoft XML Processor: 139
Step 4: Establish A Connection Between InBloom & QuickBooks 140
Step 5: Configure Your Bank Account & Vendor Categories 141
Step 6: You're Ready To Sync! 142

Configuring Printers, Barcodes & Cash Drawers 143

Installing Printers 144
Viewing Workstations 145
Managing Workstations 145
Configuring Printers On Windows 146
Configuring Cash Drawers on Macs 147

Recommended Hardware 148
Receipt Printers 149
Laser or Inkjet Document Printers 149
Label Printers 150
Cash Drawers 150
Barcode Scanners 151
Installing Barcode Fonts 151
Installing Barcode Fonts on Mac OS X 151
Installing Barcode Fonts on Windows 152

Markdown Manager 154
Managing Price Codes & Reductions 155
Adding, Editing, & Deleting Price Codes 155
An Example Price Code 157
Setting Default Price Codes 158
Modifying A Price Code 159

Backups & Security 160
The Basics Of Backing Up Your Data 161
A Full Non-Dated Backup 161
A Full Backup 162
A Data Only Backup 162
Restoring From A Backup 163
Swapping A Data File 163
Restoring From A Data Only Backup 164
Recovering From A Damaged File 165
Backup Considerations 168
Backup Frequency 168
Backup Structure 168
Notes About Restoring & Upgrading 169

Settings 170
Managing Your InBloom Settings 171
General Tab 171

Inventory Tab 172
Contacts & Sales 173
Payment Types & QuickBooks Settings 174
Security 176
Printing 177
Backups 178
Graphics 179
Customizations 180
The Category Calculation 183

Managing InBloom Users **187**
Adding & Managing InBloom Users 188

Using Find Mode **191**
An Introduction To Find Mode 192
Using QuickSearch To Find Items 193
Using Find Mode To Find Items 193
Finding Items Redux 195
Find Records That Match One Set Of Criteria But Not Another 196
Search Operators 197
< Less Than 197
≥ Less Than Or Equal 197
> Greater Than 197
≤ Greater Than Or Equal 197
= Exact Match 198
... Range 198
! Duplicates 198
// Today's Date 199
? Invalid Date or Time 199
@ One Character 199
** Zero Or More Characters* 200
"" Literal Text 200
== Field Content Match 200

Customizing Printouts **202**

A Brief How-To Guide 203
Advanced Printout Customization 206
Print Settings For Each Print Layout 206
Custom Inventory Printouts 207
Undoing Printout Customizations 208

Stuff Done Occasionally **209**
Exporting Data To A Spreadsheet or PDF 210
Exporting Info To A Spreadsheet or PDF 211
Sharing InBloom Data 211
Upgrading from InBloom Lite to InBloom Pro 212

Troubleshooting **214**
Questions & Answers 215
You can't login 215
InBloom doesn't switch to the correct printer when printing 215
Emailing through Gmail or other web-based emails 216
InBloom error message "… the printer is not connected to a port" 217

Contact Us **219**
Thank you for using InBloom Shop Software! 220

About InBloom

Managing a business based on consignment is a daunting management task. Keeping track of inventory, consignors, different consignment commissions, consignor payments, sales, store credit, and more can require superhuman management skills that not everyone has. InBloom was designed to take the reins for you so you can run your business more easily and more effectively.

InBloom was built using the FileMaker Pro, the leading desktop database engine, and was developed as well as refined through real-world use by consignment businesses of all sorts and sizes.

There are two versions of InBloom: **InBloom Lite** & **InBloom Pro**

InBloom Lite	*InBloom Pro*
• Designed for use with **only one** computer • Does not require any additional software to run • You can only customize printouts with your company name, address, and logo	• Designed for use with one **or more** computers • Requires FileMaker Pro on each computer • You can customize printouts down to every pixel, point, and margin; including but not limited to fonts, layout, and images.

- You can upgrade easily between the two versions at any time. See InBloomSoftware.com/upgrade for info
- Have questions? Email support@inbloomsoftware.com

The salient difference is that InBloom Pro absolutely requires FileMaker Pro to run (in the same way you need Microsoft Excel to run a spreadsheet), whereas InBloom Lite already contains a stripped-down version of FileMaker within the application, that lets you do everything except customize the design of printouts and network between multiple computers.

Mac Computer Requirements

- Mac OS X 10.6 or 10.5.7
- PowerPC G4 (867MHz+), G5 processor or Intel processor
- 256MB of RAM
- **InBloom Pro only:** FileMaker Pro version 10.0 or greater

PC Computer Requirements

- Windows Vista Ultimate, Business, Home (SP 1) or Windows XP Professional, Home Edition (SP 3)
- Pentium III 700MHz or higher
- 256MB of RAM
- SVGA (1024 x 768) or higher resolution video adapter and display
- **InBloom Pro only:** FileMaker Pro version 10.0 or greater.

Multi-User Requirements

InBloom uses a standard client and server configuration. That means when you network multiple computers to share the InBloom data, one computer must be designated the central point that all other computers connect to. Thus, we recommend that you choose your most powerful computer to be the central server.

If you have five or more users, we strongly recommend that you designate a Mac or PC to only serve your InBloom data over your network. Also, note that if you share files, serve web pages, play video games, or stream iTunes/Pandora from this computer, **it can greatly slowdown the performance** of FileMaker over a network.

Installing InBloom

Setting Up InBloom Lite On A Mac

1. **Download InBloom Lite from InBloomSoftware.com/download**
   Download the .ZIP file of the Lite version, for Mac, from the InBloom website. Note that you can always download the latest copy from the website and input your serial number (in the Help menu).

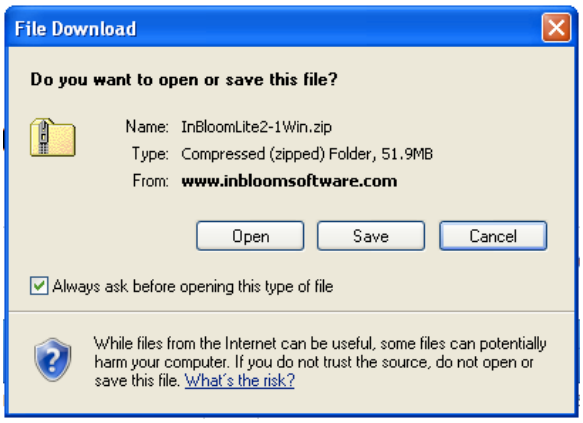
2. **Install Barcode Fonts (only if using a barcode scanner)**
   See the Installing Barcode Fonts page for full instructions. If you're not using a scanner, skip to Step 3.

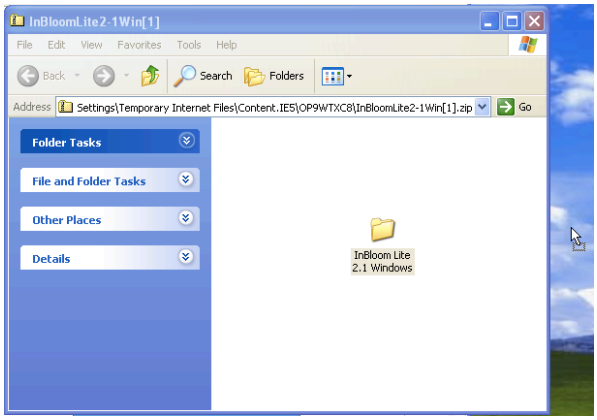
3. **Install InBloom Lite In Your Applications Folder**
   Find the .ZIP file you downloaded in Step 1, doubleclick to unzip it, and drag the unzipped InBloom Lite folder to your Applications folder

4. **Start Using InBloom**
   For Lite users, double-click the InBloom Shop Software icon inside the InBloom folder.

Setting Up InBloom Lite On A PC

1. **Download InBloom Lite from InBloomSoftware.com/download**
   Download the .ZIP file of the Lite version, for PC, from the InBloom website. Your web browser may ask you to Open or Save the download, click Open. If a new view of the InBloom Lite folder opens, drag the InBloom folder to your desktop to finish installing InBloom.


File Download
Do you want to open or save this file?
Name: InBloomLite2-1Win.zip
Type: Compressed (zipped) Folder, 51.9MB
From: www.inbloomsoftware.com
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?



2. **Install Barcode Fonts (only if using a barcode scanner)**
   See the Installing Barcode Fonts page for full instructions. If you're not using a scanner, skip to Step 3.

3. **Install InBloom Lite In Your My Documents Folder**
   Find the InBloom folder you placed on the Desktop in Step 1. Next, click on the Start menu, then My Documents, then drag your InBloom Lite folder from the desktop to the My Documents folder.

4. **Start Using InBloom**

   For Lite users, open the InBloom folder, then double-click the InBloom Shop Software icon.

Setting Up InBloom Pro On A Mac

1. **Download InBloom Pro from InBloomSoftware.com/download**
   Download the .ZIP file of the Pro version, for Mac, from the InBloom website. Note that you can always download the latest copy from the website and input your serial number (in the Help menu).

2. **Install Barcode Fonts (only if using a barcode scanner)**
   See the Installing Barcode Fonts page for full instructions. If you're not using a scanner, skip to Step 3.

3. **Install InBloom Pro In Your Documents Folder**
   Find the .ZIP file you downloaded in Step 1, doubleclick to unzip it, and drag the InBloom Pro folder to your desktop.

   Next, click on the Finder icon on the far left of the Dock. In the new window, click on the *Documents* folder on the left sidebar, then drag your InBloom Pro folder from the *Desktop* to the *Documents* folder.

   Open your InBloom Pro folder, then open the folder named *Add to FileMaker* Extensions, highlight all three files and go to the Edit menu at the top of the screen and choose *Copy 3 Items*.

4. **Install FileMaker Pro**
   Doubleclick the FileMaker installer you downloaded from FileMaker.com or run it from the FileMaker installation CD. This is usually simple and only requires you to type in your name, company, and FileMaker serial number when prompted.

You will also need to install some plugins for FileMaker. Once the FileMaker installer is complete, go to your Applications folder, open the FileMaker Pro 11 folder, then open the Extensions folder. Go to the Edit menu at the top of your screen and choose Paste Items.

5. **Start Using InBloom**

   Go to the InBloom Pro folder in your *Documents* folder and doubleclick the **InBloom.fp7** file.

   Note you can drag this file to your Dock for easy access, but do not move it from the InBloom Pro folder.

Setting Up InBloom Pro On A PC

1. **Download InBloom Pro from InBloomSoftware.com/download**
   Download the .ZIP file of the Pro version, for PC, from the InBloom website. Note that you can always download the latest copy from the website and input your serial number (in the Help menu).

2. **Install Barcode Fonts (only if using a barcode scanner)**
   See the Installing Barcode Fonts page for full instructions. If you're not using a scanner, skip to Step 3.

3. **Install InBloom Pro In Your Documents Folder**
   Find the .ZIP file you downloaded in Step 1, doubleclick to unzip it, and drag the InBloom Pro folder to your desktop.

   Next, click on the *Start* menu, then *My Documents*, then drag your InBloom Pro folder from the desktop to the *My Documents* folder.

   Open your InBloom Pro folder, then open the folder named *Add to FileMaker* Extensions, highlight all three files, right-click on them and choose *Copy* ...

4. **Install FileMaker Pro**
   Doubleclick the FileMaker installer you downloaded from FileMaker.com or run it from the FileMaker installation CD. This is usually simple and only requires you to type in your name, company, and FileMaker serial number when prompted.

   You will also need to install some plugins for FileMaker. Once the

FileMaker installer is complete, go to the Program Files folder where FileMaker is installed. This is usually on the C: drive. So click on the *Start* menu, then select *My Computer*. Next, doubleclick the following hierarchy of folders: *My Computer* > *Program Files* > *FileMaker* > *FileMaker Pro 11* > *Extensions*. Now that you've made it to the *Extensions* folder, right click and choose Paste to place the three FileMaker plugins from the previous step in this folder.

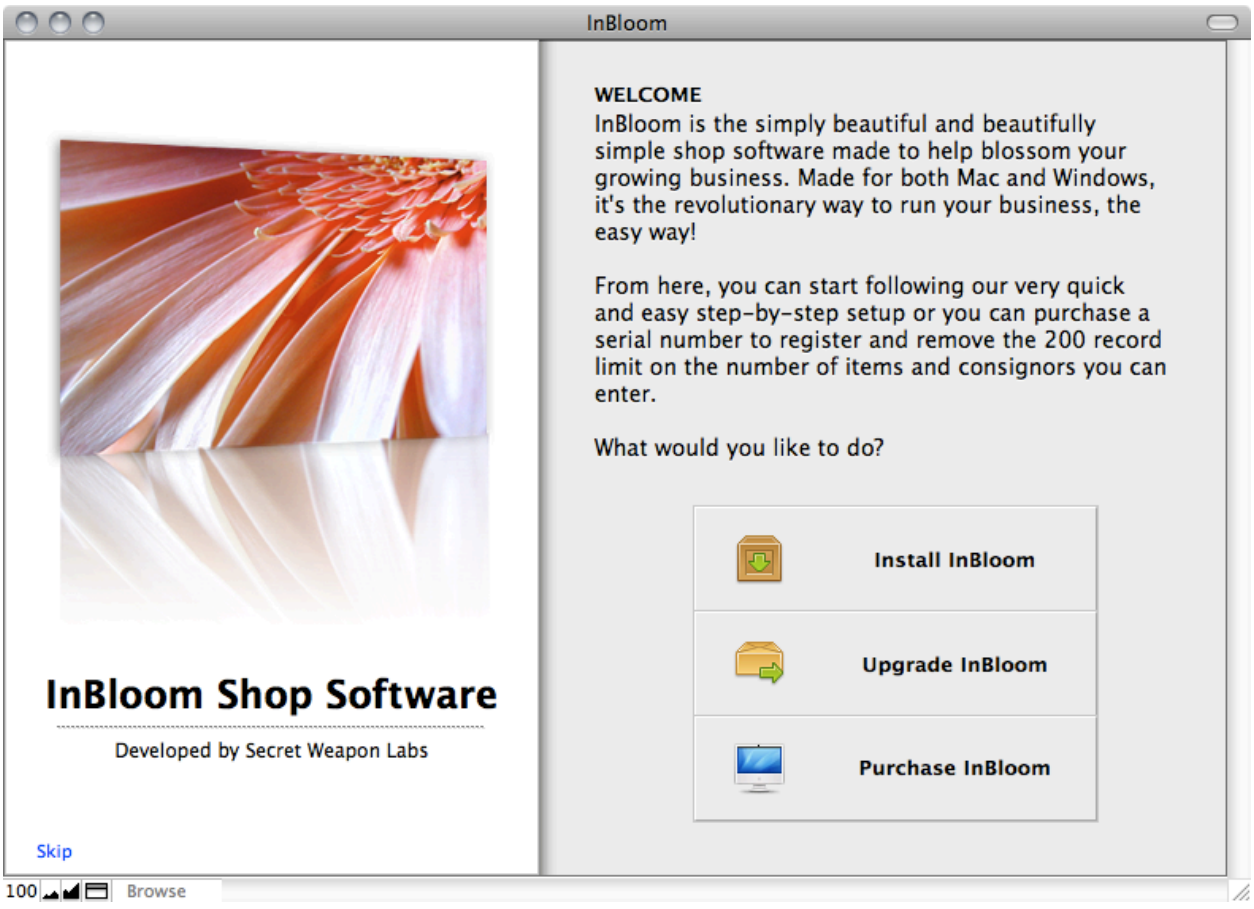
5. **Start Using InBloom**

   Go to the InBloom Pro folder in your *My Documents* folder and doubleclick the **InBloom.fp7** file.

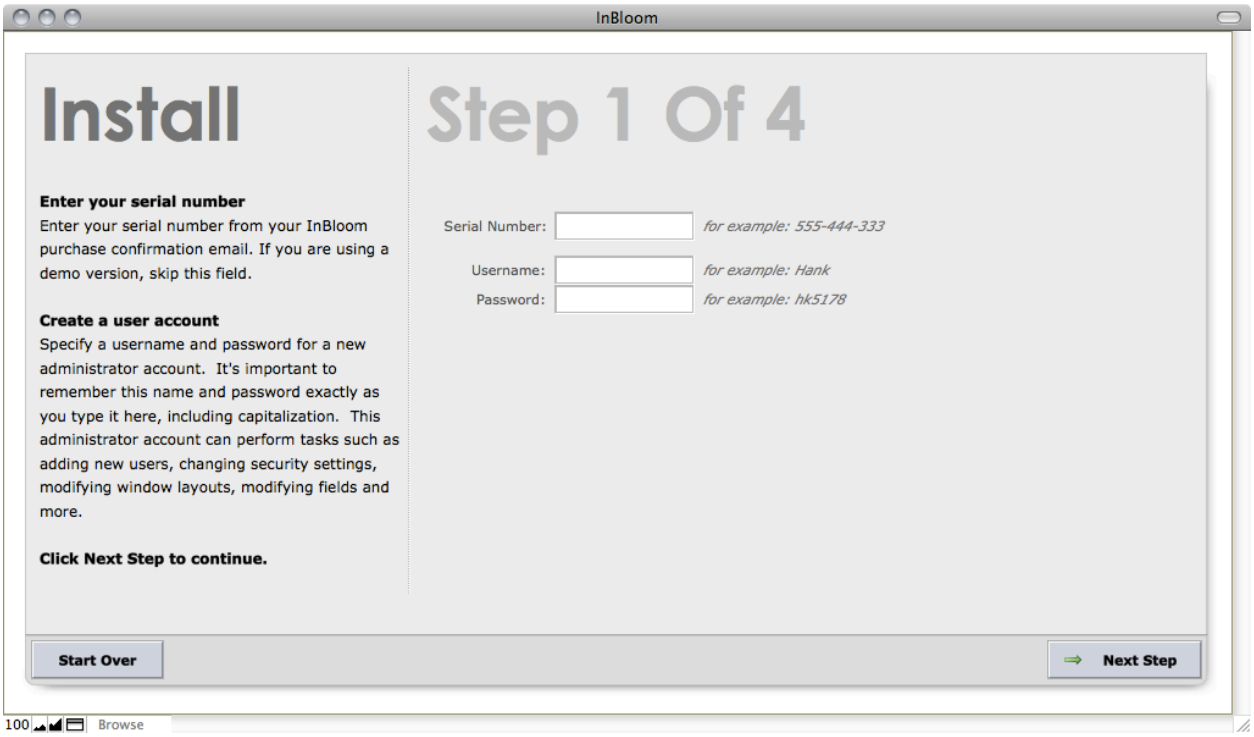
Note that you can not move this file from the InBloom Pro folder. Right click the file to make a shortcut and place the shortcut elsewhere on your system (e.g . your Desktop, etc.)

Running The Install Process

After opening InBloom and agreeing to the license terms, you will arrive at the Welcome screen, shown below. Choose the **Install InBloom** button to begin the four step wizard which quickly walks you through the basics of getting your business started with InBloom.


InBloom
InBloom Shop Software
Developed by Secret Weapon Labs
Skip
WELCOME
InBloom is the simply beautiful and beautifully simple shop software made to help blossom your growing business. Made for both Mac and Windows, it's the revolutionary way to run your business, the easy way!
From here, you can start following our very quick and easy step-by-step setup or you can purchase a serial number to register and remove the 200 record limit on the number of items and consignors you can enter.
What would you like to do?
Install InBloom
Upgrade InBloom
Purchase InBloom
100
Browse

Step 1

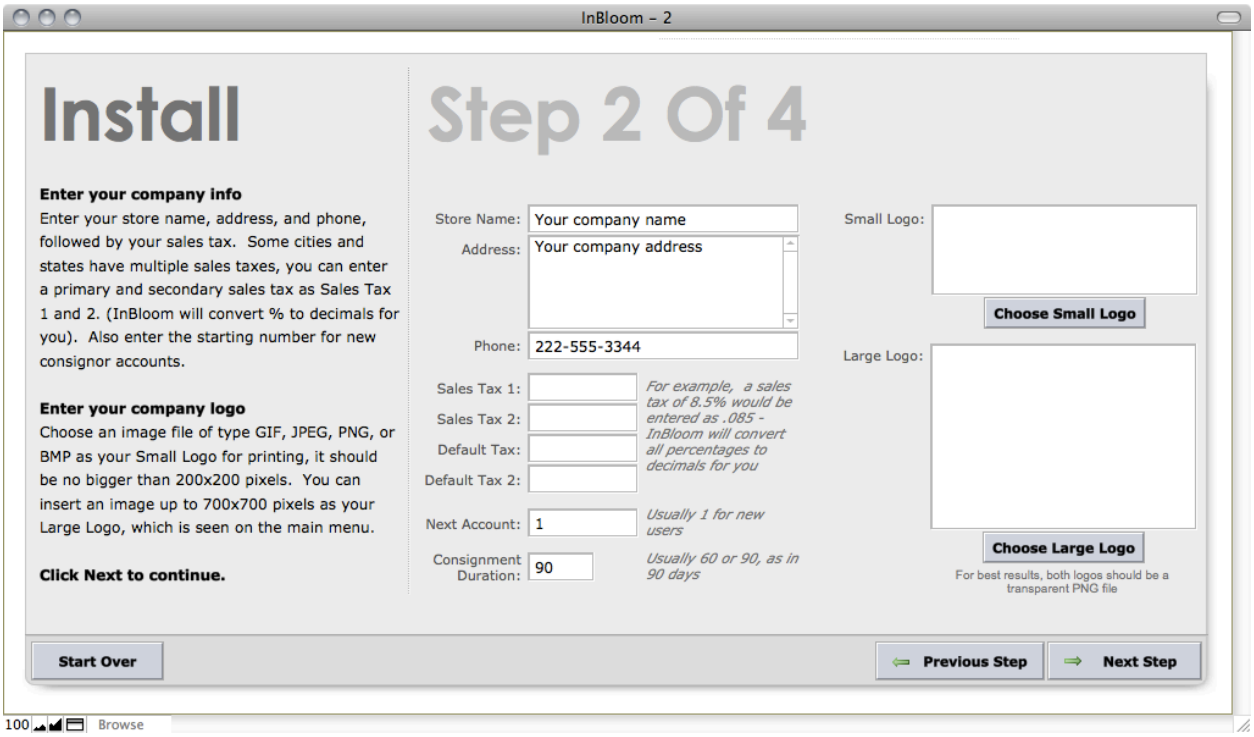

InBloom
Install
Step 1 Of 4
Enter your serial number
Enter your serial number from your InBloom purchase confirmation email. If you are using a demo version, skip this field.
Create a user account
Specify a username and password for a new administrator account. It's important to remember this name and password exactly as you type it here, including capitalization. This administrator account can perform tasks such as adding new users, changing security settings, modifying window layouts, modifying fields and more.
Click Next Step to continue.
Serial Number:
for example: 555-444-333
Username:
for example: Hank
Password:
for example: hk5178
Start Over
Next Step
100
Browse

In Step 1, you begin by entering in basic information to register and personalize our copy of InBloom.

Simply begin, by entering your serial number from your purchase confirmation email in the serial number field. If you are running a demo version of InBloom, you do not have to enter a number. Next, enter a username and password. The user account you create is an administrator of your copy of InBloom. It's important to remember this name and password, including capitalization. You will need it every time you open InBloom as well as to perform administrative tasks such as printing checks, adding users, and modifying screen layouts.

Click the **Next Step** button when ready.

Step 2


InBloom – 2
Install
Step 2 Of 4
Enter your company info
Enter your store name, address, and phone, followed by your sales tax. Some cities and states have multiple sales taxes, you can enter a primary and secondary sales tax as Sales Tax 1 and 2. (InBloom will convert % to decimals for you). Also enter the starting number for new consignor accounts.
Enter your company logo
Choose an image file of type GIF, JPEG, PNG, or BMP as your Small Logo for printing, it should be no bigger than 200x200 pixels. You can insert an image up to 700x700 pixels as your Large Logo, which is seen on the main menu.
Click Next to continue.
Store Name:
Your company name
Address:
Your company address
Phone:
222-555-3344
Sales Tax 1:
Sales Tax 2:
Default Tax:
Default Tax 2:
For example, a sales tax of 8.5% would be entered as .085 - InBloom will convert all percentages to decimals for you
Next Account:
1
Usually 1 for new users
Consignment Duration:
90
Usually 60 or 90, as in 90 days
Small Logo:
Choose Small Logo
Large Logo:
Choose Large Logo
For best results, both logos should be a transparent PNG file
Start Over
Previous Step
Next Step
100
Browse

In Step 2, enter in your company information in the appropriate fields.

This information is used in the general settings and the logos are displayed on receipts, printouts, and the home screen. You can change these settings later, whenever you like, in the Settings area.

Next, enter in any tax percentages you regularly charge customers. InBloom lets you choose one or both of these taxes for items sold in the Point of Sale module. Enter a default tax value if you want a sales tax to be automatically added to each item in the Point of Sale module.

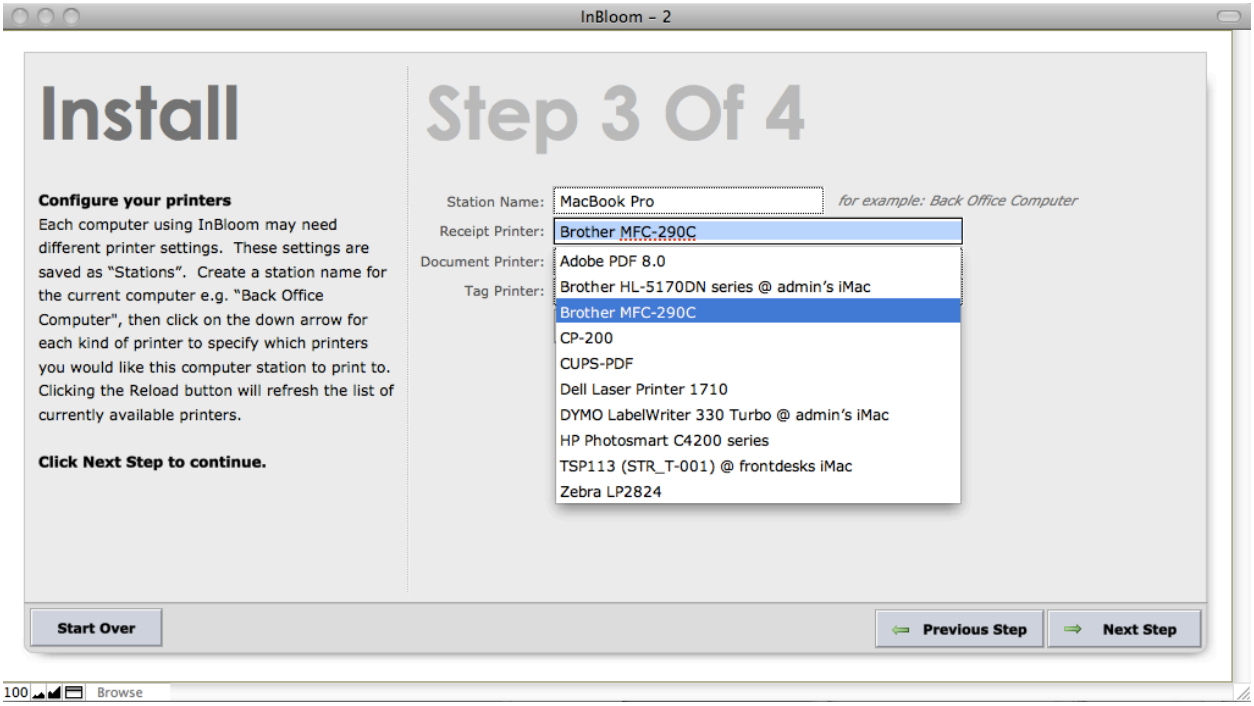
Enter a number you would like to start numbering consignor accounts with. Generally, new businesses will start with 1, while pre-

established businesses will already have pre-existing account numbers. For pre-established businesses, enter the next available account number you would like InBloom to use.

Lastly, if you have a logo for your business, you can make your copy of InBloom *yours* by inserting a small logo and a large logo in the appropriate fields. The small logo is used for printing on both receipts, contracts, as well as reports and should generally be in black and white. The large logo only appears on the Main Menu screen described in the Other Options chapter of this manual.

Click the **Next Step** button when you are ready to proceed.

Step 3


InBloom – 2
Install
Step 3 Of 4
Configure your printers
Each computer using InBloom may need different printer settings. These settings are saved as "Stations". Create a station name for the current computer e.g. "Back Office Computer", then click on the down arrow for each kind of printer to specify which printers you would like this computer station to print to. Clicking the Reload button will refresh the list of currently available printers.
Click Next Step to continue.
Station Name:
MacBook Pro
for example: Back Office Computer
Receipt Printer:
Brother MFC-290C
Document Printer:
Tag Printer:
Adobe PDF 8.0
Brother HL-5170DN series @ admin's iMac
Brother MFC-290C
CP-200
CUPS-PDF
Dell Laser Printer 1710
DYMO LabelWriter 330 Turbo @ admin's iMac
HP Photosmart C4200 series
TSP113 (STR_T-001) @ frontdesks iMac
Zebra LP2824
Start Over
Previous Step
Next Step
100
Browse

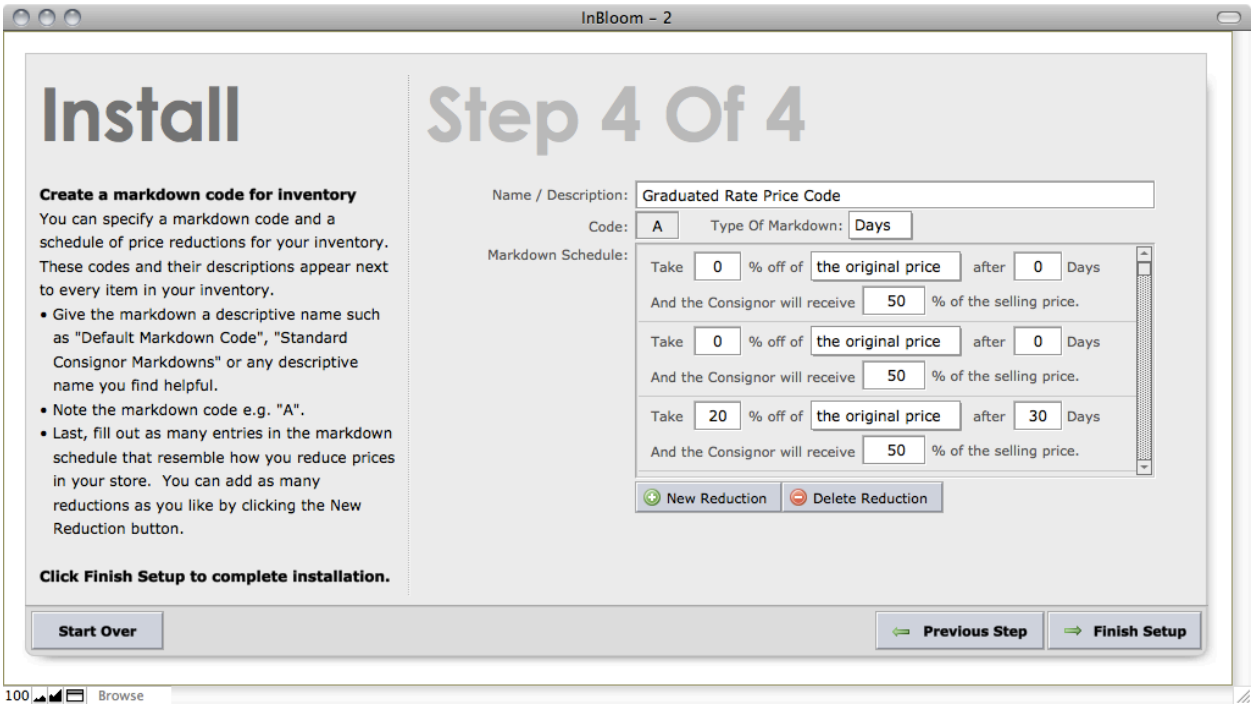
In Step 3, you specify a configuration for the three different printers InBloom uses.

Each configuration is called a Station and is especially useful and important for InBloom Pro users that have networked copies of FileMaker Pro and are sharing printers between several computers. First name the configuration, then click on each printer field to specify the printer you are using for receipts (generally a thermal receipt printer), for documents (a laser or inkjet printer), and for price tags (a thermal label printer or thermal tag printer). Choose a printer from the popup menu that appears under each field.

If you are looking for a printer and it is not appearing in the printer list, hit the **Reload Printer List** button below the printer fields. If the printer still does not appear, make sure it is currently on and that you can print to it in other applications.

Click the **Next Step** button when you are ready to proceed.

Step 4


InBloom – 2
Install
Step 4 Of 4
Create a markdown code for inventory
You can specify a markdown code and a schedule of price reductions for your inventory. These codes and their descriptions appear next to every item in your inventory.
• Give the markdown a descriptive name such as "Default Markdown Code", "Standard Consignor Markdowns" or any descriptive name you find helpful.
• Note the markdown code e.g. "A".
• Last, fill out as many entries in the markdown schedule that resemble how you reduce prices in your store. You can add as many reductions as you like by clicking the New Reduction button.
Click Finish Setup to complete installation.
Name / Description: Graduated Rate Price Code
Code: A
Type Of Markdown: Days
Markdown Schedule:
Take 0 % off of the original price after 0 Days
And the Consignor will receive 50 % of the selling price.
Take 0 % off of the original price after 0 Days
And the Consignor will receive 50 % of the selling price.
Take 20 % off of the original price after 30 Days
And the Consignor will receive 50 % of the selling price.
New Reduction
Delete Reduction
Start Over
Previous Step
Finish Setup
100
Browse

In Step 4, you specify the store and consignor split for inventory and specify the schedule, if any, at which inventory prices are marked down in InBloom.

This process is done by Markdown Codes which are assigned to each consignor and each piece of inventory. InBloom will assign a default name to a code for you, such as the letter A. You can give the code a name and/or description that will help you identify any specifics that are important. Next, choose a type for the markdown schedule. This will denote whether markdowns should occur based on a number of days, months, or weeks from the merchandise was entered into InBloom e.g. 20 days or 1 month. Then follow the simple language description for each part of a markdown and consignor split.

Note that you must include at least one markdown schedule that says "Take 0% off of the original price after 0 days. And the Consignor will receive (specify a percentage)% of the selling price."

An example of a consignment store markdown policy where the split is 60/40 for 3 months and then the store keeps 100% of any sales after 4 months is noted below:

Take **0%** off of the original price after **0** days. And the Consignor will receive **40%** of the selling price

Take **20%** off of the original price after **30** days. And the Consignor will receive **40%** of the selling price

Take **40%** off of the original price after **60** days. And the Consignor will receive **40%** of the selling price

Take **10%** off of the original price after **120** days. And the Consignor will receive **0%** of the selling price

For more info and help, see the Managing Markdown Codes & Reductions section in the Stuff Done Occasionally chapter.

Click the **Finish Setup** button when you are ready to finish the installation process. The install wizard will now finish applying all of your settings to InBloom and will display a progress while doing so. Please do not quit the program or end the install process until it is complete, it can take a minute or two depending on the speed of your computer.

When complete, you will see a confirmation screen (shown below). Click on the **InBloom Menu** button and you will be directed to the Main Menu.

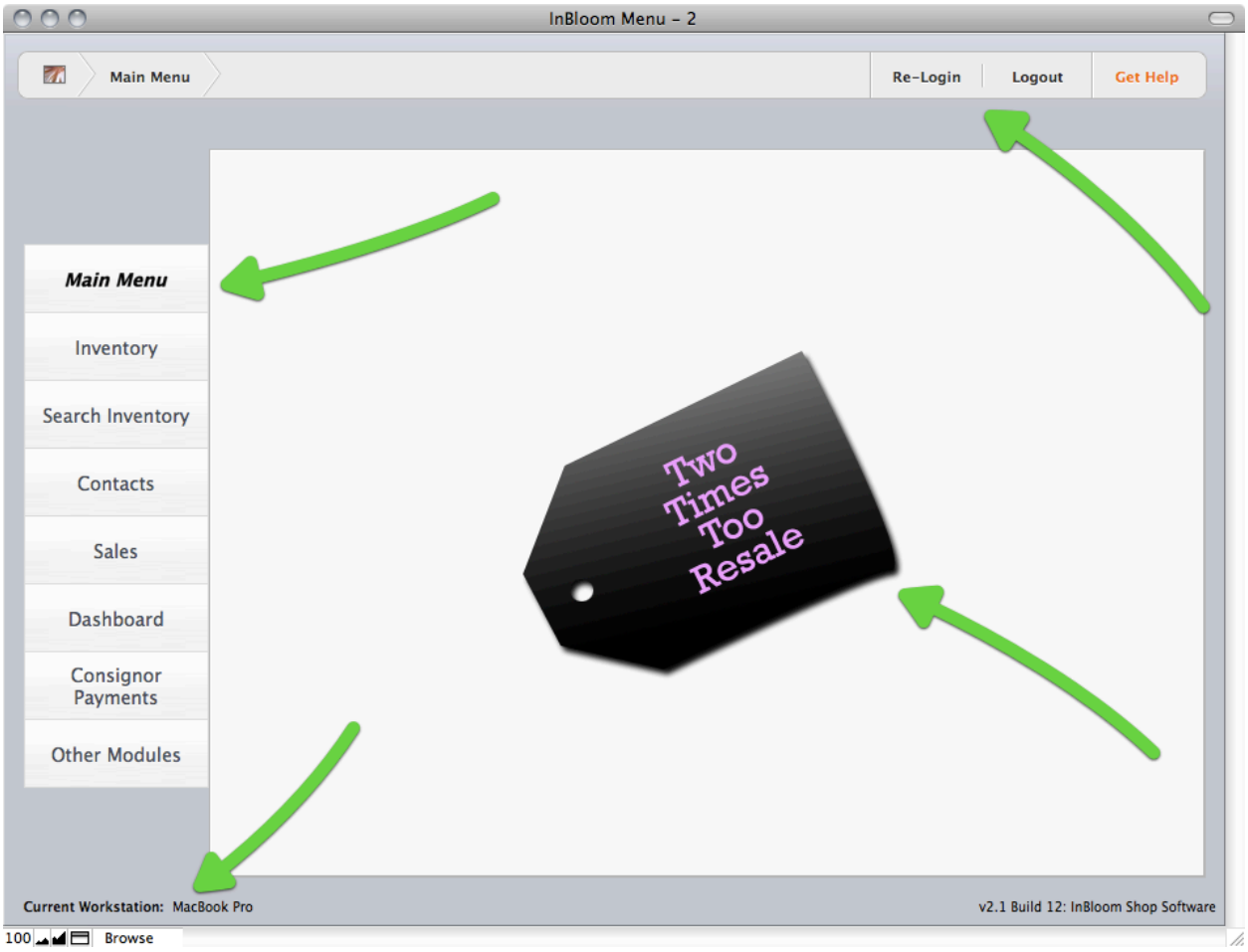
InBloom – 2
Installation Complete
You're done!!!
Installation is now complete -- click the InBloom Menu button below to start using InBloom. You have been logged in with the username and password you specified.
For questions: you can always email for free tech support to support@inbloomsoftware.com or check our forums online where you can browse topics and answers submitted by us and other users. The forum address is: http://www.InBloomSoftware.com/forums
InBloom Menu
The mighty oak was once just an acorn that held its ground
-- Chinese proverb
100
Browse

Introduction

Meet InBloom

The InBloom Main Menu

After installing and logging into InBloom, the Main Menu screen is displayed. It is your starting point, offers easy access to nearly all of the major functions of the software, and can be accessed from nearly every screen within InBloom.

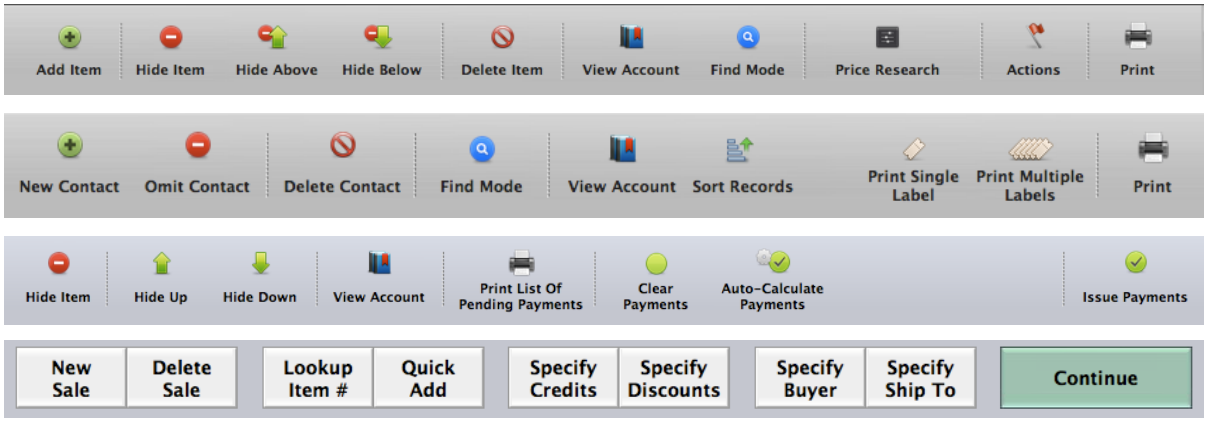


- The left sidebar buttons quickly let you browse & search inventory, browse & search contacts, write sales, view your daily sales totals, pay consignors, and more
- Use the Re-Login button to change access while staying connected to the database
- Add your logo to make your InBloom *yours*
- The current workstation setting which is linked to your printer preferences appears at the bottom.

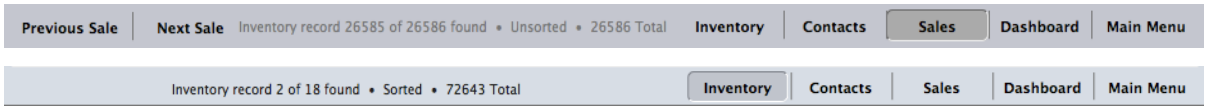
Some Basic Things

InBloom is set up to be smooth and fairly easy at a glance. Here are some important things to note about the interface:

1. **There is no save button**. All of your changes are saved the instant you change records, automagically. You won't be harassed about whether or not you want to save changes to each and every thing you type. In case you accidentally remove a description or name, there is a log of changes to refer back to.
2. **The main functions are centralized to the toolbar at the top of the window.** Every primary screen lets you manage through clicks at the top. Deeper functions are available through menu bar options at the top of your screen.

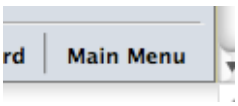


3. The very bottom of each window contains various buttons used to navigate between records, display the status of the current record,



and jump between different areas: Main Menu, Sales, Inventory, etc.

4. Throughout InBloom, you can note that the **Main Menu** button will always return you to the Main Menu as a starting point for your next action and it will simultaneously exit any pending action, such as requests in

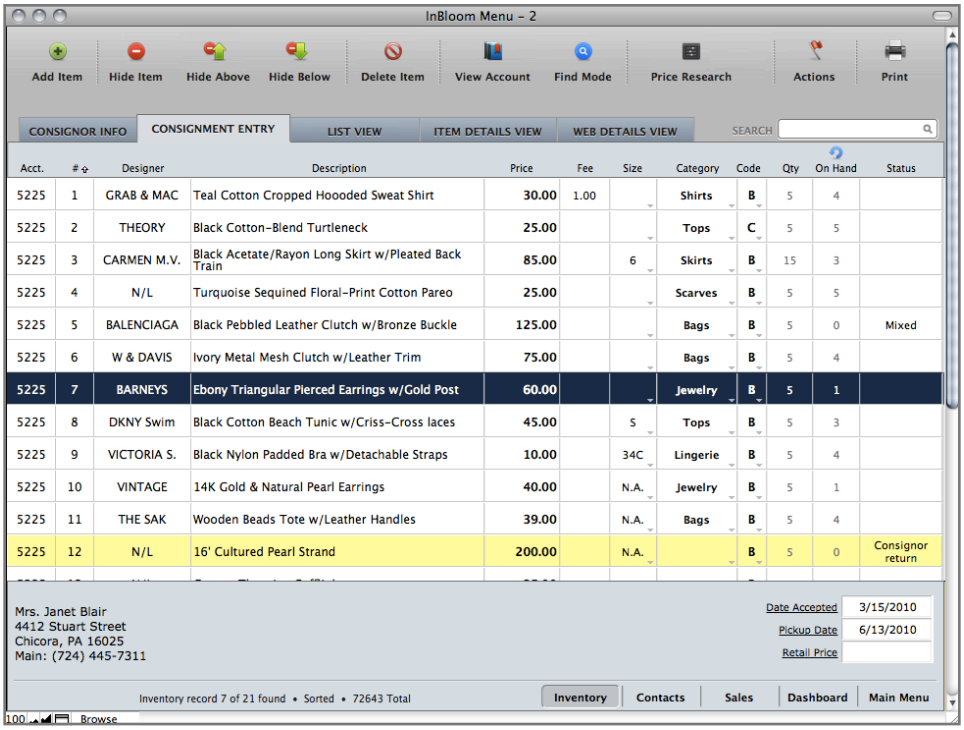


Find Mode (discussed later). **Consider it your "failsafe" button that cleans up after you.**

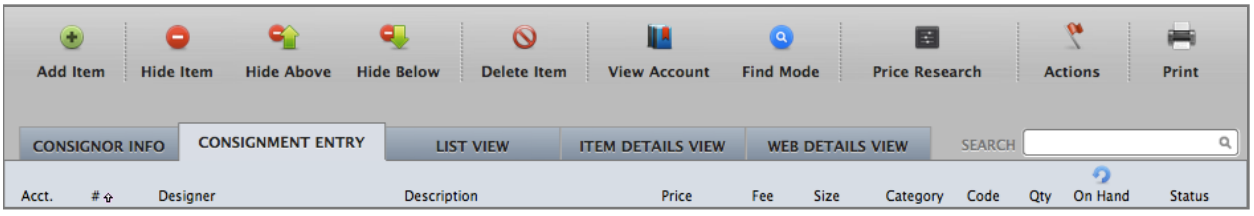
The Basics Of Inventory

Viewing Your Inventory

InBloom has four primary screens you can switch between to manage various levels of detail about your Inventory. All of these screens feature a toolbar and footer with various functions, to help you navigate your inventory as easily as possible.


InBloom Menu – 2
Add Item
Hide Item
Hide Above
Hide Below
Delete Item
View Account
Find Mode
Price Research
Actions
Print
CONSIGNOR INFO
CONSIGNMENT ENTRY
LIST VIEW
ITEM DETAILS VIEW
WEB DETAILS VIEW
SEARCH
Acct. # Designer Description Price Fee Size Category Code Qty On Hand Status
5225 1 GRAB & MAC Teal Cotton Cropped Hoooded Sweat Shirt 30.00 1.00 Shirts B 5 4
5225 2 THEORY Black Cotton-Blend Turtleneck 25.00 Tops C 5 5
5225 3 CARMEN M.V. Black Acetate/Rayon Long Skirt w/Pleated Back Train 85.00 6 Skirts B 15 3
5225 4 N/L Turquoise Sequined Floral-Print Cotton Pareo 25.00 Scarves B 5 5
5225 5 BALENCIAGA Black Pebbled Leather Clutch w/Bronze Buckle 125.00 Bags B 5 0 Mixed
5225 6 W & DAVIS Ivory Metal Mesh Clutch w/Leather Trim 75.00 Bags B 5 4
5225 7 BARNEYS Ebony Triangular Pierced Earrings w/Gold Post 60.00 Jewelry B 5 1
5225 8 DKNY Swim Black Cotton Beach Tunic w/Criss-Cross laces 45.00 S Tops B 5 3
5225 9 VICTORIA S. Black Nylon Padded Bra w/Detachable Straps 10.00 34C Lingerie B 5 4
5225 10 VINTAGE 14K Gold & Natural Pearl Earrings 40.00 N.A. Jewelry B 5 1
5225 11 THE SAK Wooden Beads Tote w/Leather Handles 39.00 N.A. Bags B 5 4
5225 12 N/L 16' Cultured Pearl Strand 200.00 N.A. B 5 0 Consignor return
Mrs. Janet Blair
4412 Stuart Street
Chicora, PA 16025
Main: (724) 445-7311
Date Accepted 3/15/2010
Pickup Date 6/13/2010
Retail Price
Inventory record 7 of 21 found • Sorted • 72643 Total
Inventory
Contacts
Sales
Dashboard
Main Menu
100
Browse

The Inventory Toolbar



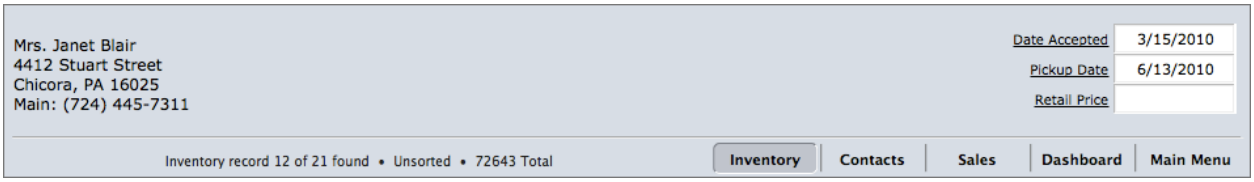
The main inventory screens has a toolbar that perform the following functionality:

Toolbar Button	Function
Add Item	Adds an item to the account of the currently selected item
Hide Item	Temporarily hide the selected item from the list of items viewed
Hide Above	Temporarily hide items ABOVE the current item from the item list
Hide Below	Temporarily hide items BELOW the current item from the item list
Delete Item	Permanently deletes an item from the inventory
View Account	Displays all items in the account of the selected item
Find Mode	Enters the powerful Find Mode to search your inventory by any criteria
Price Research	Performs a historical price comparison based on descriptive keywords
Actions	Lets you mark items as returned to the consignor, donated on behalf of the consignor, or back on the sales floor
Print	Lets you print or email contracts, inventory lists, price tags, account status reports, and more.

The Search Field

The Search field is a simple and smart way to search for any inventory record without typing specially formatted queries (like in Find Mode), letting you search like you do with Google, but in your copy of InBloom.

The Inventory Footer

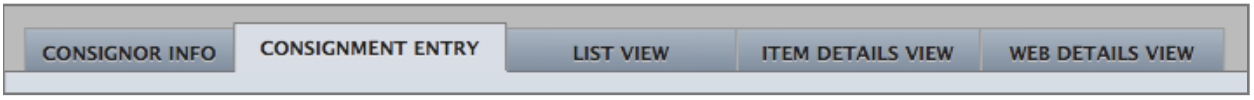


The footer of the Inventory lists gives you a synopsis of basic consignor contact information as well as additional info about each inventory item of when an item came in, when the item is due to be picked up, and the retail price (a.k.a. MSRP) of an item.

The bottom-most part of the footer displays information about the currently selected record, the found records, and the sort status.

The Different Views Of Your Inventory

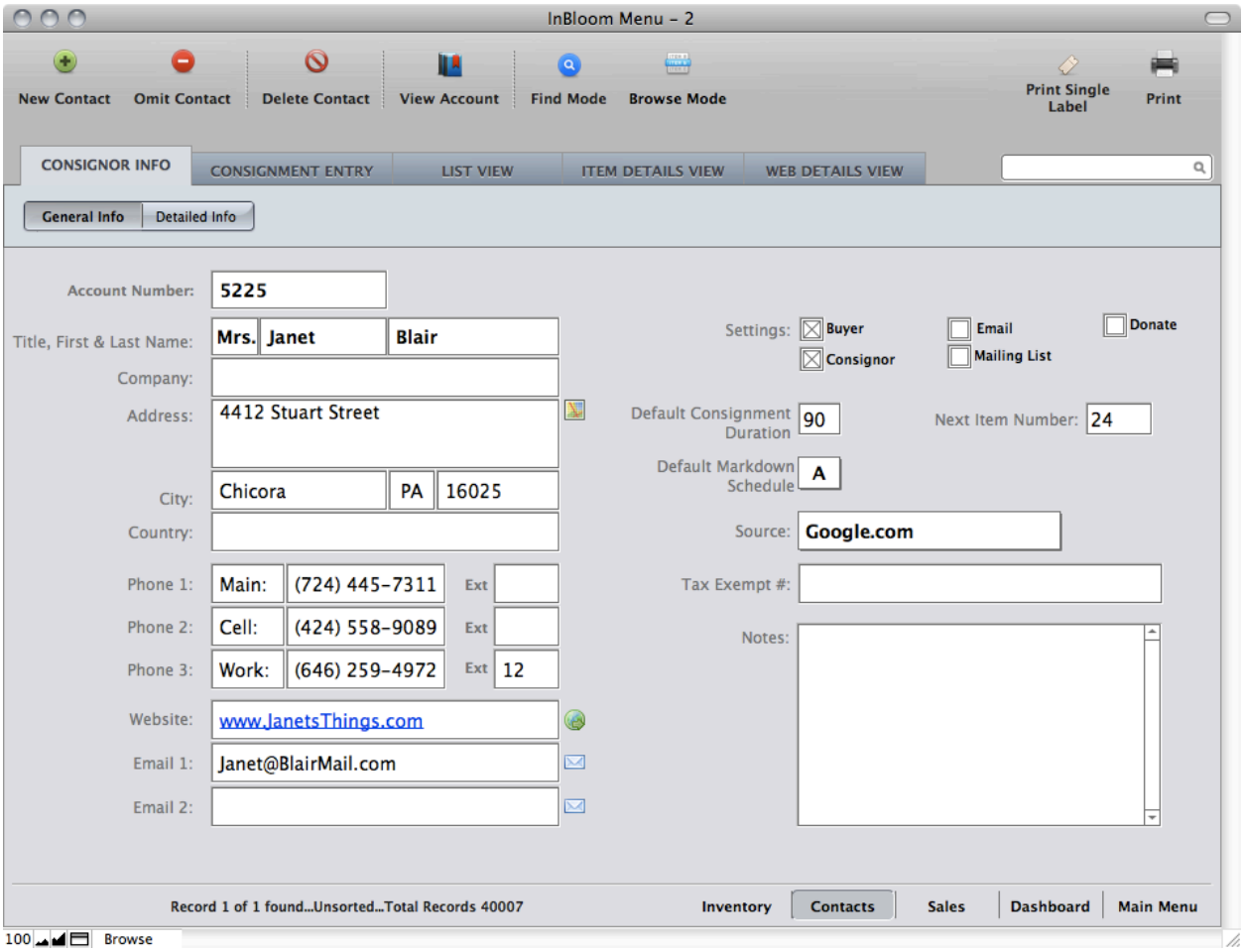
On each inventory view is a series of tabs which lets you drill down to a specific set of information for every piece of inventory:



- **Consignor Info** lets you browse and edit the full array of info you can keep track of for each consignor.
- **Consignment Entry** is the primary screen for browsing, searching, and editing Inventory.
- **List View** is a deeper spreadsheet-like view of all the transactions for a list of items.

- **Item Details View** is a more specific view of every piece of information about your Inventory that is tracked by InBloom.
- **Web Details View** is a more specific view of any details maintained for exporting to a webstore.

The Consignor Info View

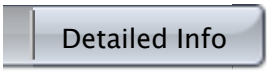


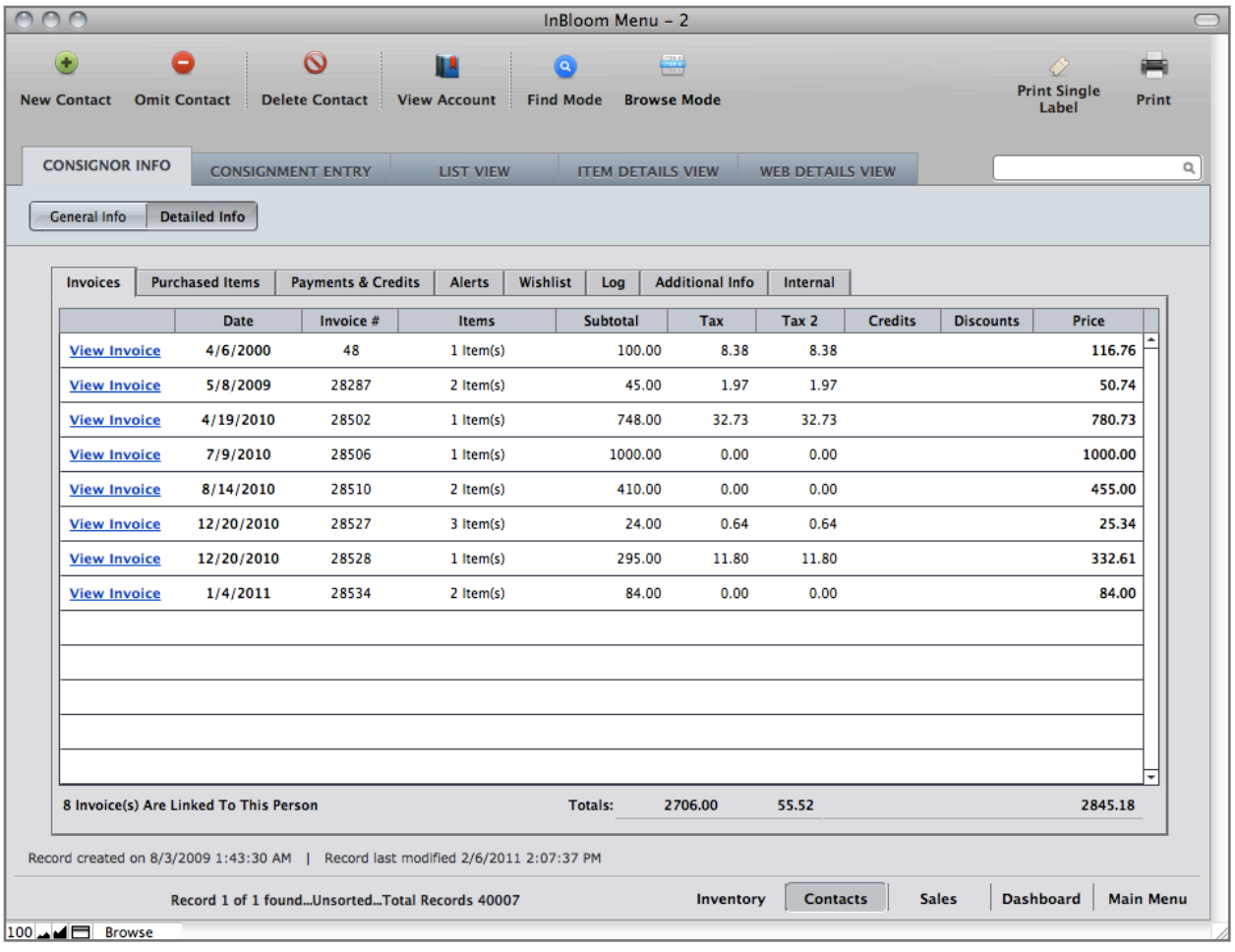
The **Consignor Info** view is the left most tab in all of the inventory views. This view lets you view and edit all of the info that InBloom tracks about a consignor. Each consignor is linked to their inventory

by the number in the Account Number field. To view all of the items for the currently viewed consignor, click the **View Account** button. You can also print an individual mailing label for this person using your label printer by clicking on the **Print Single Label** button.

In addition, you can change defaults for this consignor's inventory in case you want to manage this particular consignor's account differently from the default settings you have for other consignors.

The **Detailed Info** button, just under the tab switches the screen to related information.




InBloom Menu – 2
New Contact
Omit Contact
Delete Contact
View Account
Find Mode
Browse Mode
Print Single Label
Print
CONSIGNOR INFO
CONSIGNMENT ENTRY
LIST VIEW
ITEM DETAILS VIEW
WEB DETAILS VIEW
General Info
Detailed Info
Invoices
Purchased Items
Payments & Credits
Alerts
Wishlist
Log
Additional Info
Internal
Date | Invoice # | Items | Subtotal | Tax | Tax 2 | Credits | Discounts | Price
View Invoice 4/6/2000 48 1 Item(s) 100.00 8.38 8.38 116.76
View Invoice 5/8/2009 28287 2 Item(s) 45.00 1.97 1.97 50.74
View Invoice 4/19/2010 28502 1 Item(s) 748.00 32.73 32.73 780.73
View Invoice 7/9/2010 28506 1 Item(s) 1000.00 0.00 0.00 1000.00
View Invoice 8/14/2010 28510 2 Item(s) 410.00 0.00 0.00 455.00
View Invoice 12/20/2010 28527 3 Item(s) 24.00 0.64 0.64 25.34
View Invoice 12/20/2010 28528 1 Item(s) 295.00 11.80 11.80 332.61
View Invoice 1/4/2011 28534 2 Item(s) 84.00 0.00 0.00 84.00
8 Invoice(s) Are Linked To This Person
Totals: 2706.00 55.52 2845.18
Record created on 8/3/2009 1:43:30 AM | Record last modified 2/6/2011 2:07:37 PM
Record 1 of 1 found...Unsorted...Total Records 40007
Inventory
Contacts
Sales
Dashboard
Main Menu
100
Browse

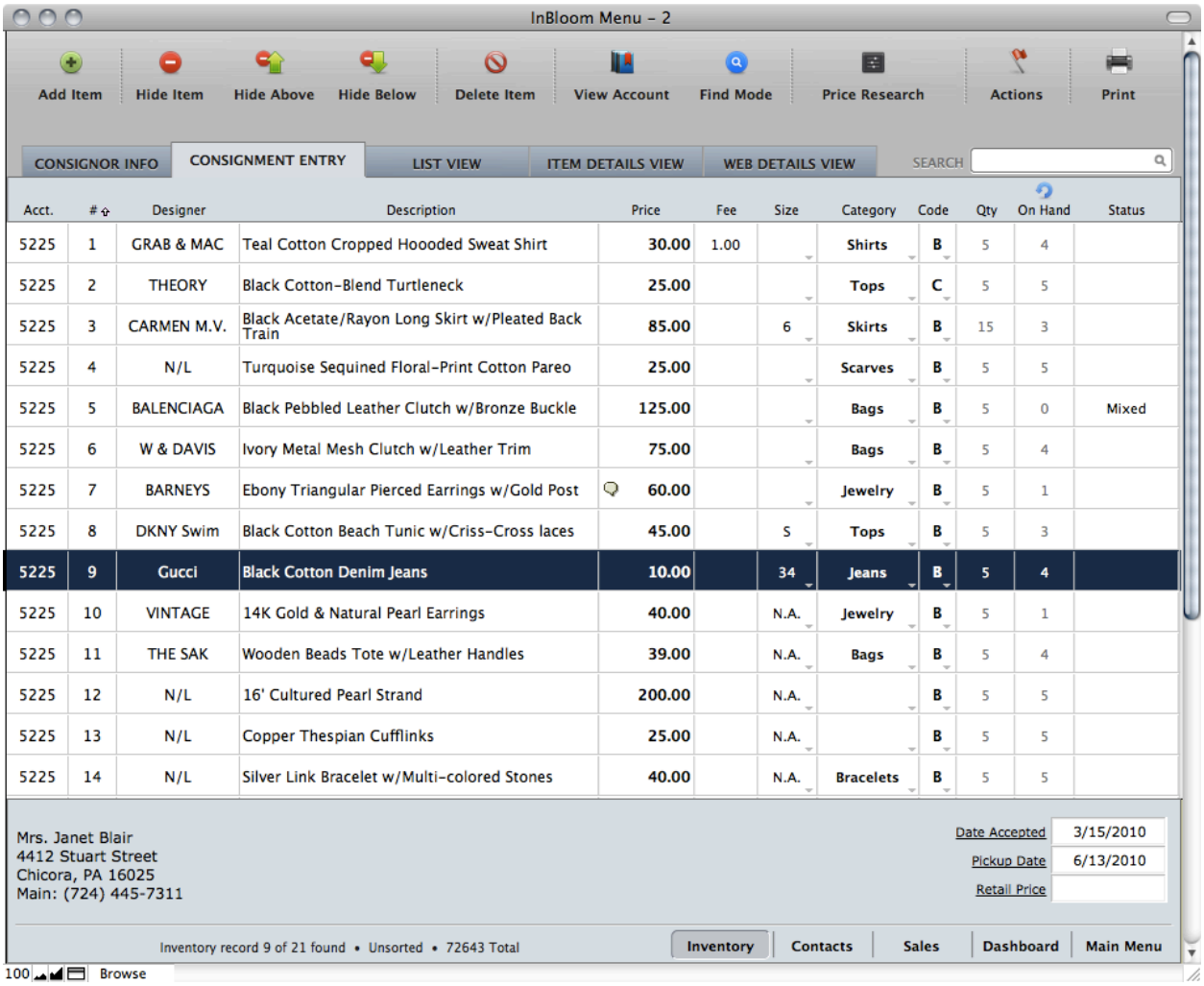
If the consignor is also a customer, here you can see invoices linked to

this consignor, items purchased, past payments & store credits, items on the consignor's wishlist, and any popup alerts to display when viewing this person's inventory.

All of these functions are discussed later in the Managing Contacts section of the manual.

The Consignment Entry View

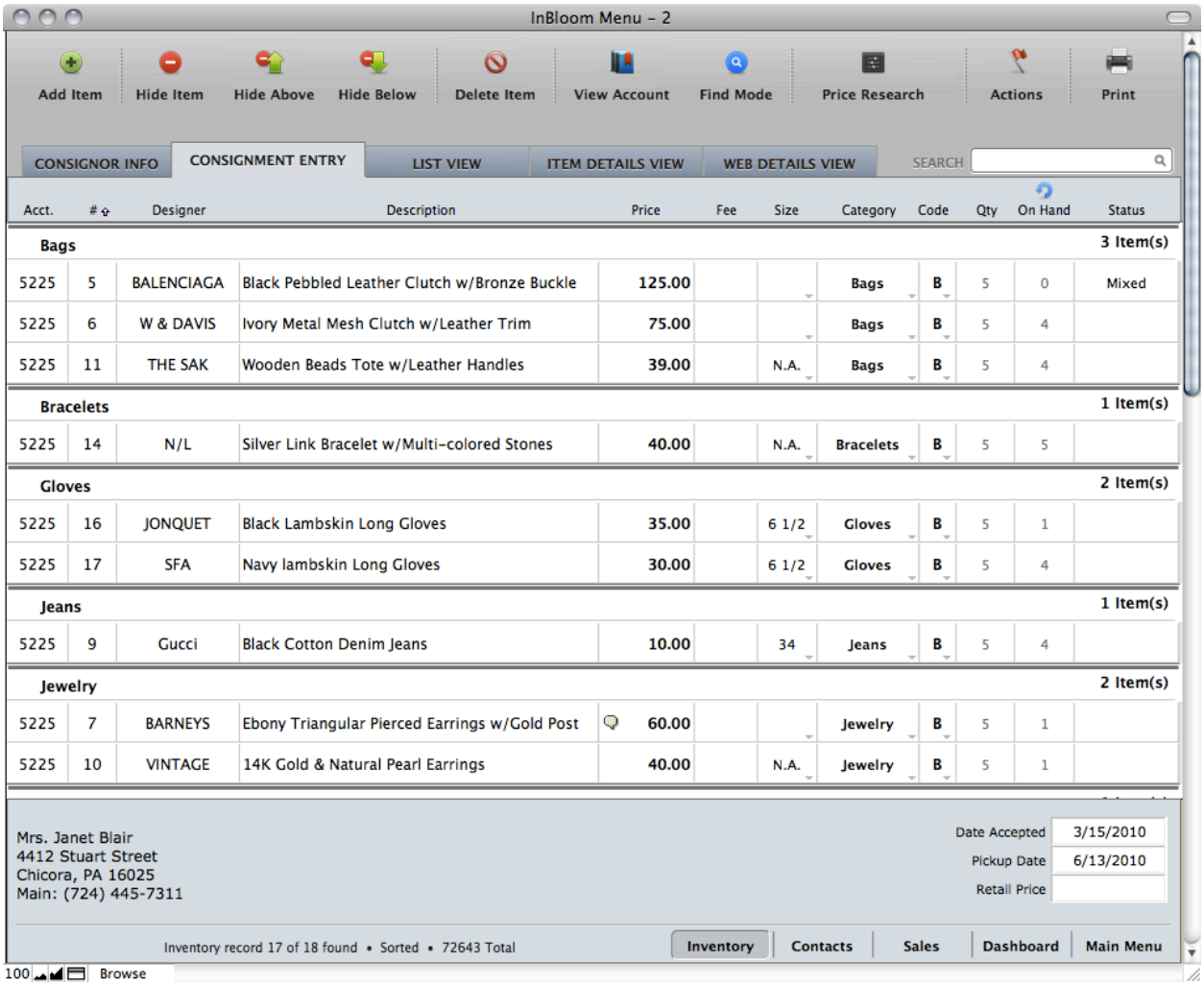
This simple-yet-powerful view of your Inventory is useful for entering in new items or getting a general overview of items in Inventory. This view can display all items in a single account or a mixed set of items from multiple accounts, all while showing basic information such as Account Number, Item Number, Designer, Description, Price, Item Fees, Size, Category, Price Code, Quantity Accepted, Available Quantity, Date Accepted, and Item Status.


InBloom Menu – 2
Add Item
Hide Item
Hide Above
Hide Below
Delete Item
View Account
Find Mode
Price Research
Actions
Print
CONSIGNOR INFO
CONSIGNMENT ENTRY
LIST VIEW
ITEM DETAILS VIEW
WEB DETAILS VIEW
SEARCH
Acct. # Designer Description Price Fee Size Category Code Qty On Hand Status
5225 1 GRAB & MAC Teal Cotton Cropped Hoooded Sweat Shirt 30.00 1.00 Shirts B 5 4
5225 2 THEORY Black Cotton-Blend Turtleneck 25.00 Tops C 5 5
5225 3 CARMEN M.V. Black Acetate/Rayon Long Skirt w/Pleated Back Train 85.00 6 Skirts B 15 3
5225 4 N/L Turquoise Sequined Floral-Print Cotton Pareo 25.00 Scarves B 5 5
5225 5 BALENCIAGA Black Pebbled Leather Clutch w/Bronze Buckle 125.00 Bags B 5 0 Mixed
5225 6 W & DAVIS Ivory Metal Mesh Clutch w/Leather Trim 75.00 Bags B 5 4
5225 7 BARNEYS Ebony Triangular Pierced Earrings w/Gold Post 60.00 Jewelry B 5 1
5225 8 DKNY Swim Black Cotton Beach Tunic w/Criss-Cross laces 45.00 S Tops B 5 3
5225 9 Gucci Black Cotton Denim Jeans 10.00 34 Jeans B 5 4
5225 10 VINTAGE 14K Gold & Natural Pearl Earrings 40.00 N.A. Jewelry B 5 1
5225 11 THE SAK Wooden Beads Tote w/Leather Handles 39.00 N.A. Bags B 5 4
5225 12 N/L 16' Cultured Pearl Strand 200.00 N.A. B 5 5
5225 13 N/L Copper Thespian Cufflinks 25.00 N.A. B 5 5
5225 14 N/L Silver Link Bracelet w/Multi-colored Stones 40.00 N.A. Bracelets B 5 5
Mrs. Janet Blair
4412 Stuart Street
Chicora, PA 16025
Main: (724) 445-7311
Date Accepted 3/15/2010
Pickup Date 6/13/2010
Retail Price
Inventory record 9 of 21 found • Unsorted • 72643 Total
Inventory
Contacts
Sales
Dashboard
Main Menu
100
Browse

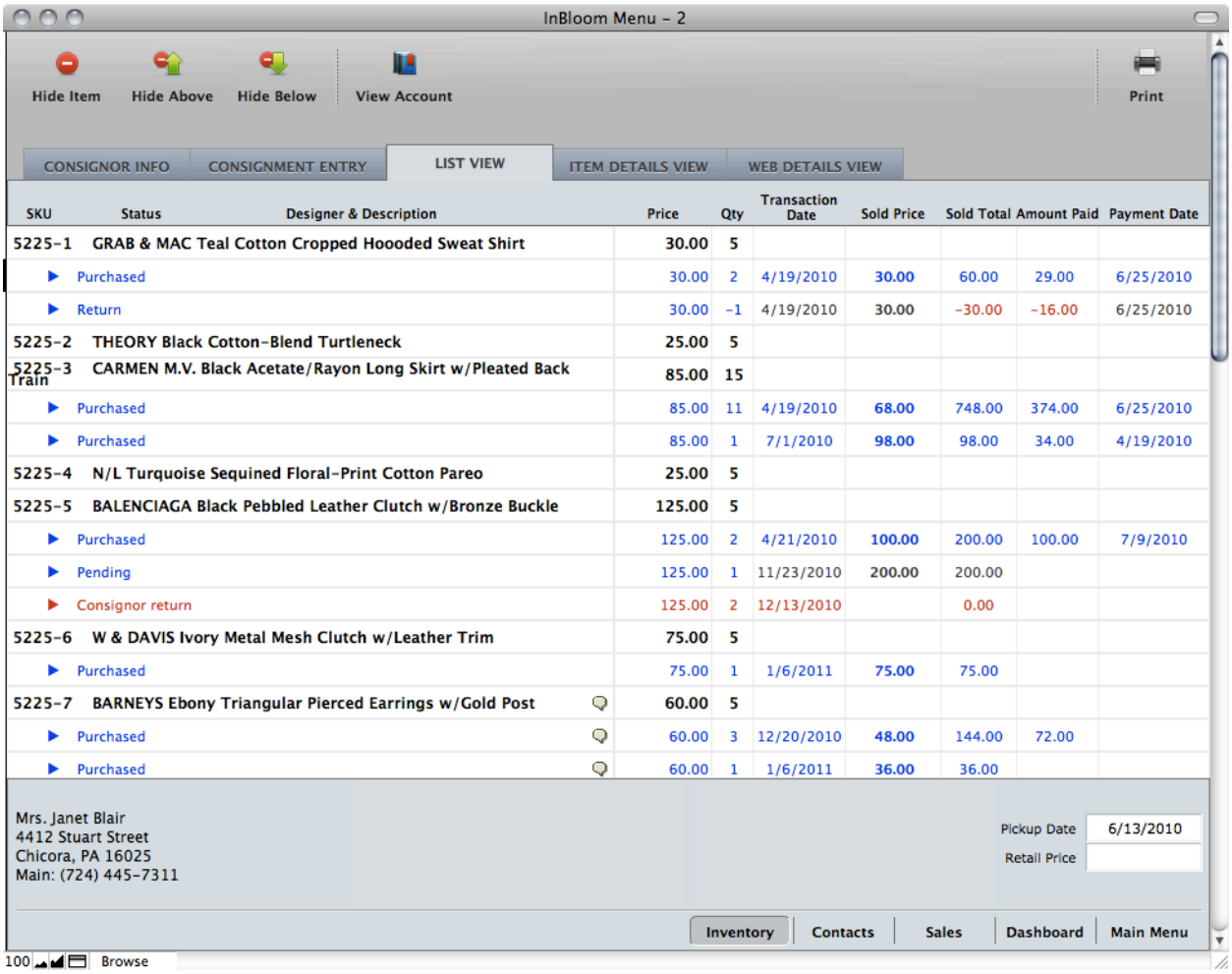
A navy blue highlight indicates which item is the selected record. This

view also features the standard inventory toolbar and footer to give you easy and intuitive access to item information in as few clicks as possible.

This is the primary inventory management screen and while simple at-a-glance, is very powerful the more you use it. Each of the field labels such as Designer, Price, Category, etc. is also a button that will let you sort your list of inventory by that field. When you do so, you'll see the items grouped within the list. For example, if you click on the Category label, you'll see items grouped like this:

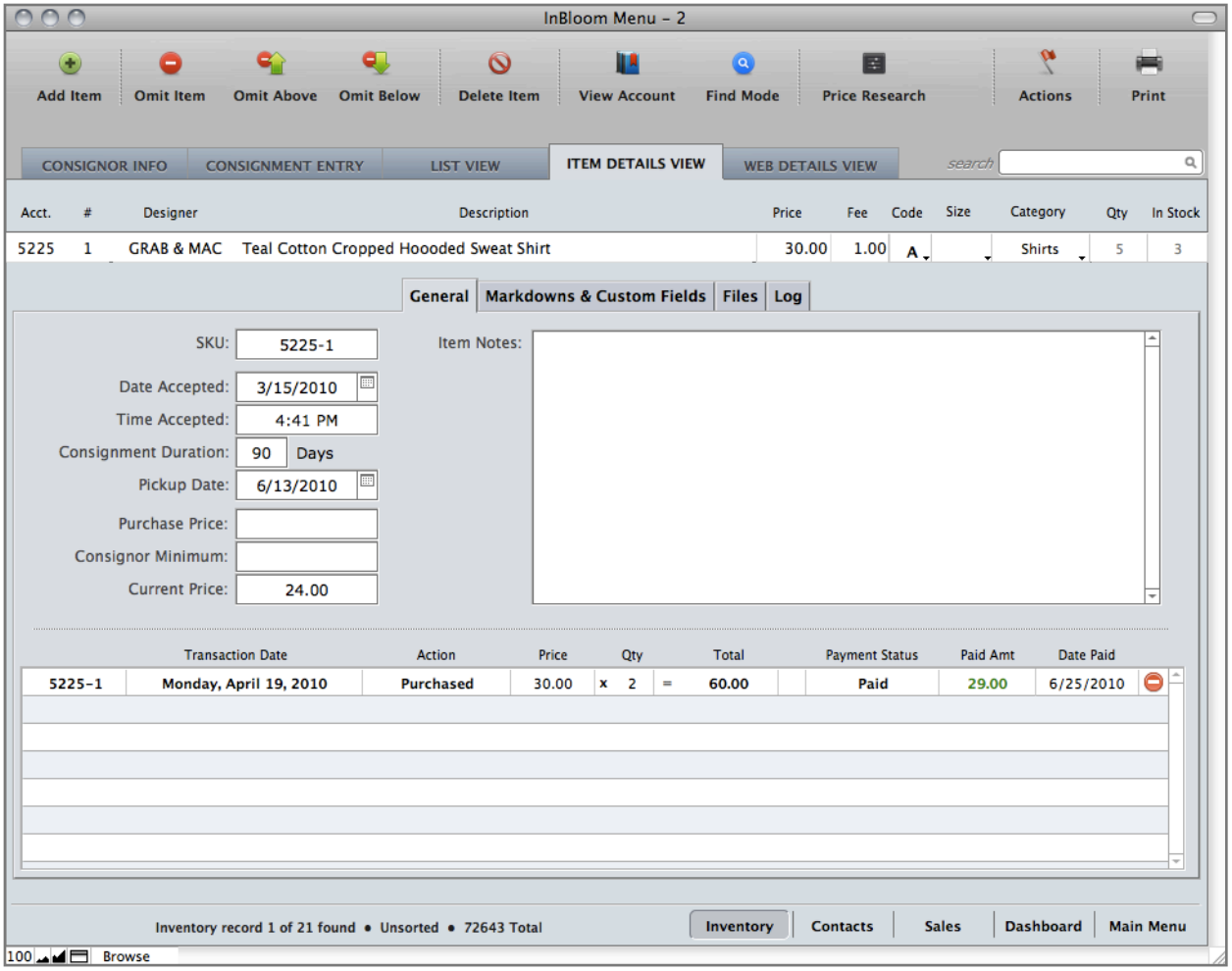

InBloom Menu – 2
Add Item
Hide Item
Hide Above
Hide Below
Delete Item
View Account
Find Mode
Price Research
Actions
Print
CONSIGNOR INFO
CONSIGNMENT ENTRY
LIST VIEW
ITEM DETAILS VIEW
WEB DETAILS VIEW
SEARCH
Acct. # Designer Description Price Fee Size Category Code Qty On Hand Status
Bags 3 Item(s)
5225 5 BALENCIAGA Black Pebbled Leather Clutch w/Bronze Buckle 125.00 Bags B 5 0 Mixed
5225 6 W & DAVIS Ivory Metal Mesh Clutch w/Leather Trim 75.00 Bags B 5 4
5225 11 THE SAK Wooden Beads Tote w/Leather Handles 39.00 N.A. Bags B 5 4
Bracelets 1 Item(s)
5225 14 N/L Silver Link Bracelet w/Multi-colored Stones 40.00 N.A. Bracelets B 5 5
Gloves 2 Item(s)
5225 16 JONQUET Black Lambskin Long Gloves 35.00 6 1/2 Gloves B 5 1
5225 17 SFA Navy lambskin Long Gloves 30.00 6 1/2 Gloves B 5 4
Jeans 1 Item(s)
5225 9 Gucci Black Cotton Denim Jeans 10.00 34 Jeans B 5 4
Jewelry 2 Item(s)
5225 7 BARNEYS Ebony Triangular Pierced Earrings w/Gold Post 60.00 Jewelry B 5 1
5225 10 VINTAGE 14K Gold & Natural Pearl Earrings 40.00 N.A. Jewelry B 5 1
Mrs. Janet Blair
4412 Stuart Street
Chicora, PA 16025
Main: (724) 445-7311
Date Accepted 3/15/2010
Pickup Date 6/13/2010
Retail Price
Inventory record 17 of 18 found • Sorted • 72643 Total
Inventory
Contacts
Sales
Dashboard
Main Menu
100
Browse

The List View

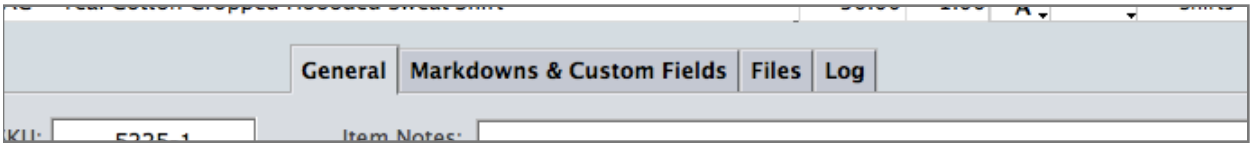

InBloom Menu - 2
Hide Item
Hide Above
Hide Below
View Account
Print
CONSIGNOR INFO
CONSIGNMENT ENTRY
LIST VIEW
ITEM DETAILS VIEW
WEB DETAILS VIEW
SKU Status Designer & Description Price Qty Transaction Date Sold Price Sold Total Amount Paid Payment Date
5225-1 GRAB & MAC Teal Cotton Cropped Hoooded Sweat Shirt 30.00 5
Purchased 30.00 2 4/19/2010 30.00 60.00 29.00 6/25/2010
Return 30.00 -1 4/19/2010 30.00 -30.00 -16.00 6/25/2010
5225-2 THEORY Black Cotton-Blend Turtleneck 25.00 5
5225-3 CARMEN M.V. Black Acetate/Rayon Long Skirt w/Pleated Back Train 85.00 15
Purchased 85.00 11 4/19/2010 68.00 748.00 374.00 6/25/2010
Purchased 85.00 1 7/1/2010 98.00 98.00 34.00 4/19/2010
5225-4 N/L Turquoise Sequined Floral-Print Cotton Pareo 25.00 5
5225-5 BALENCIAGA Black Pebbled Leather Clutch w/Bronze Buckle 125.00 5
Purchased 125.00 2 4/21/2010 100.00 200.00 100.00 7/9/2010
Pending 125.00 1 11/23/2010 200.00 200.00
Consignor return 125.00 2 12/13/2010 0.00
5225-6 W & DAVIS Ivory Metal Mesh Clutch w/Leather Trim 75.00 5
Purchased 75.00 1 1/6/2011 75.00 75.00
5225-7 BARNEYS Ebony Triangular Pierced Earrings w/Gold Post 60.00 5
Purchased 60.00 3 12/20/2010 48.00 144.00 72.00
Purchased 60.00 1 1/6/2011 36.00 36.00
Mrs. Janet Blair
4412 Stuart Street
Chicora, PA 16025
Main: (724) 445-7311
Pickup Date 6/13/2010
Retail Price
Inventory
Contacts
Sales
Dashboard
Main Menu
100
Browse

The List View is very similar to the Consignment Entry view as it displays the same set of items, but with more in-depth transaction information such as Transaction, Sold Price, Date Paid, and Amount Paid. Because of the possible sensitive nature of such information, this view can be password limited, allowing only specific users to view this information. **This view can only be browsed - you can not edit any information from this screen. In order to do so, you must do it through the Consignment Entry view or the Item Details View.**

The Item Details View



The Item Details View is a deeper look at the specifics for the currently selected item. You can still browse the specific items from the other views, but this view shows only one item at a time. Because of the possible sensitive nature of such information, this view can be password limited, allowing only specific users to view this information. In addition, this view displays an extensive amount of information about the particular item in several layers:



The first layer (shown above) is denoted under the **General** tab, which displays additional information such as Purchase Price, Consignor Minimum, Sold Invoice Number, and more.

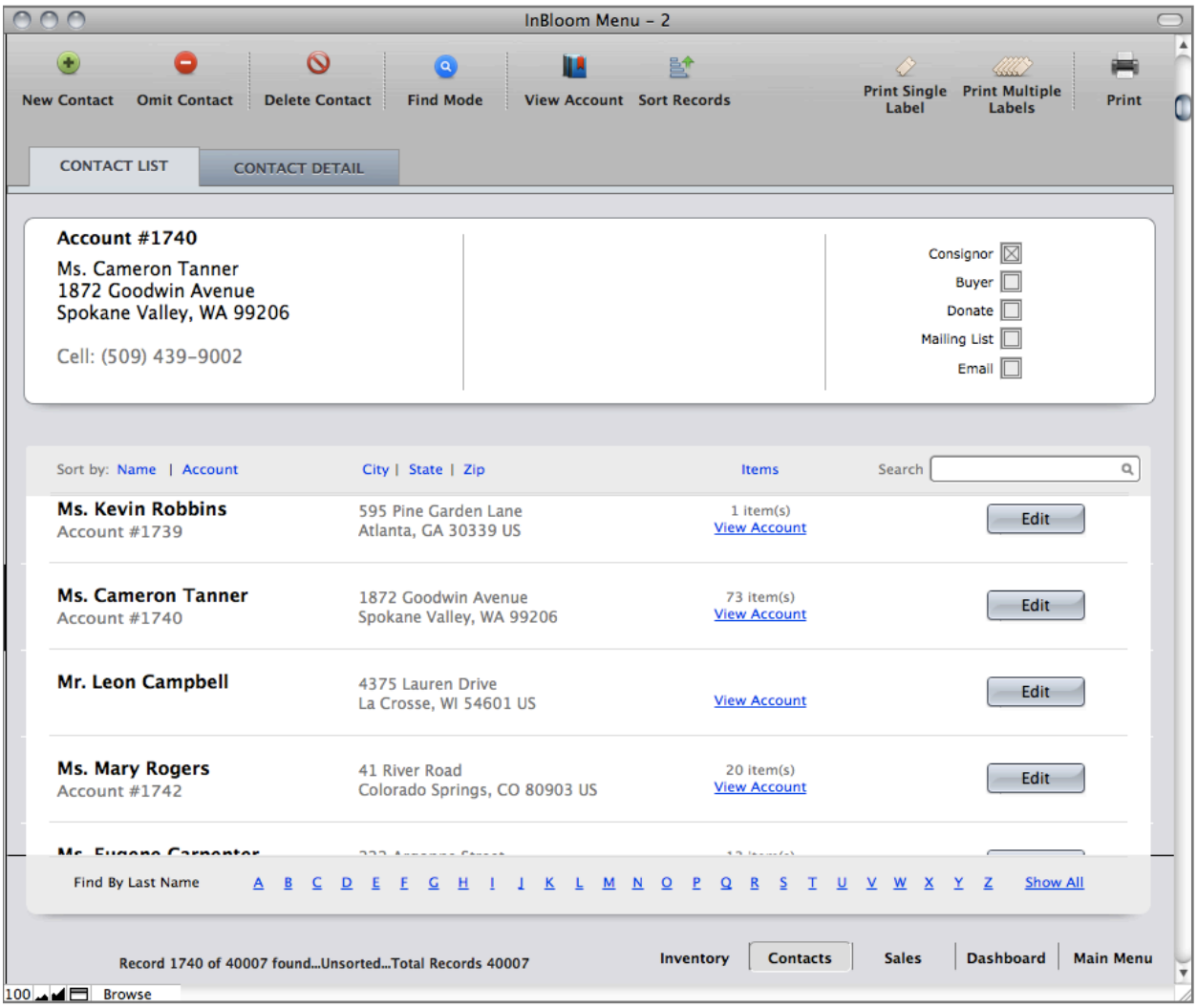
The **Markdowns & Custom Fields** tab displays a schedule of the price markdowns of this particular item, as well as any additional info stored in fields you can easily label and modify.

The **Files** tab is used to relate and store any documents or images that may relate to a particular item. You can store .PDFs, .DOCs, .JPEGs, and many other kinds of files through this tab.

The **Log** tab contains an audit field showing any and all edits to the current item and by which user.

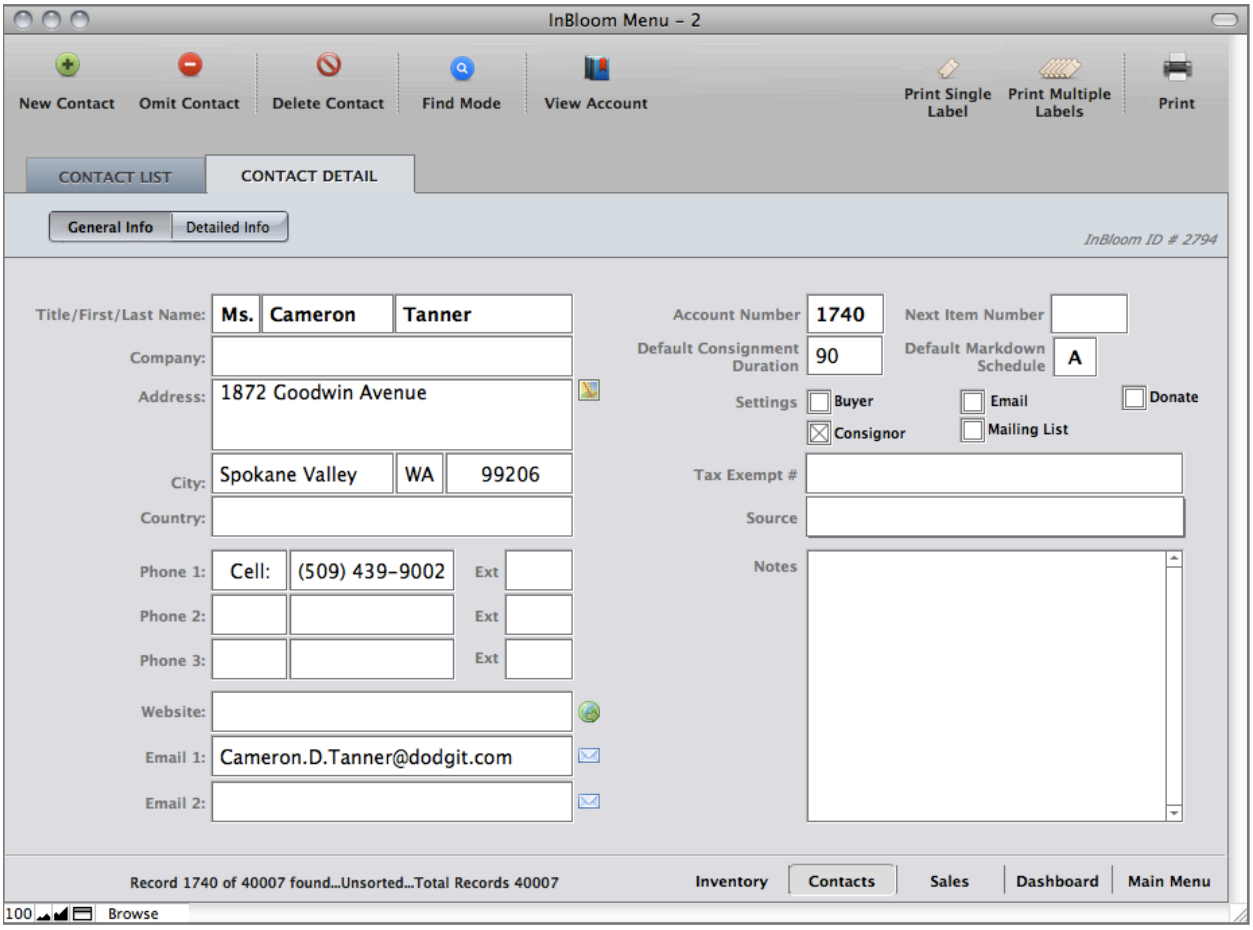
Consignors And Buyers Basics

One Really Great Address Book



The Contacts database within InBloom is a central address book that stores basic and detailed info about any person or company you do business with. Because most consignment businesses have consignors that are buyers, both consignors and buyers are stored in this same database. (Don't worry, you do not have to have two separate records if they are both buyer and consignor. InBloom manages this very easily for you). You can view the contacts as one

long list under the Contact List tab or edit info one contact at a time, by clicking either the Contact Detail tab or the Edit button to the right of the contact's name in the list.



It's worth noting that this screen is designed to mirror the Consignor Info View you saw earlier when managing Inventory. You can track the exact same information because it's in the exact same database.

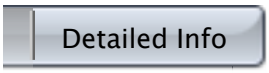
In addition the toolbar at the top lets you print a mailing label (using the **Print Single Label** button) for the contact you're viewing or for the set of contact records you're viewing (using the **Print Multiple Labels** button).

Clicking the Maps icon will open a new browser window and plot this person's address using Google Maps.

Clicking the Web Link icon will open this person's website using your web browser

Clicking the Email icon will pre-address an email in your email program to the specified email address.

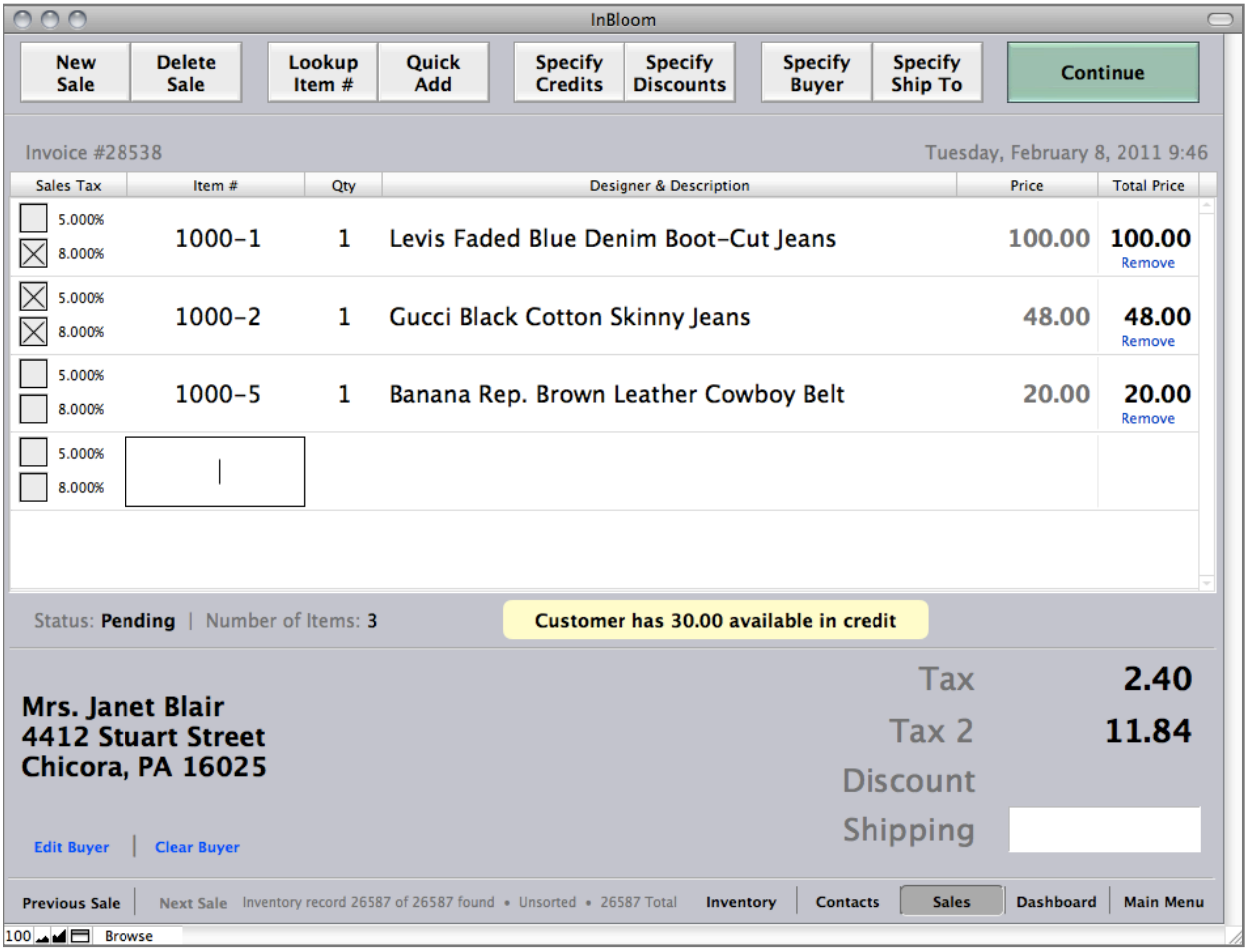
Digging Deeper Into Your Contacts



The **Detailed Info** button, just under the tab switches the screen to display deeper views of related data.
Here you can see invoices linked to this consignor, items purchased, past payments & store credits, items on the contact's wishlist, and any popup alerts to display when viewing this person's inventory. This is covered in full in the Contacts chapter.

The Basics Of Sales

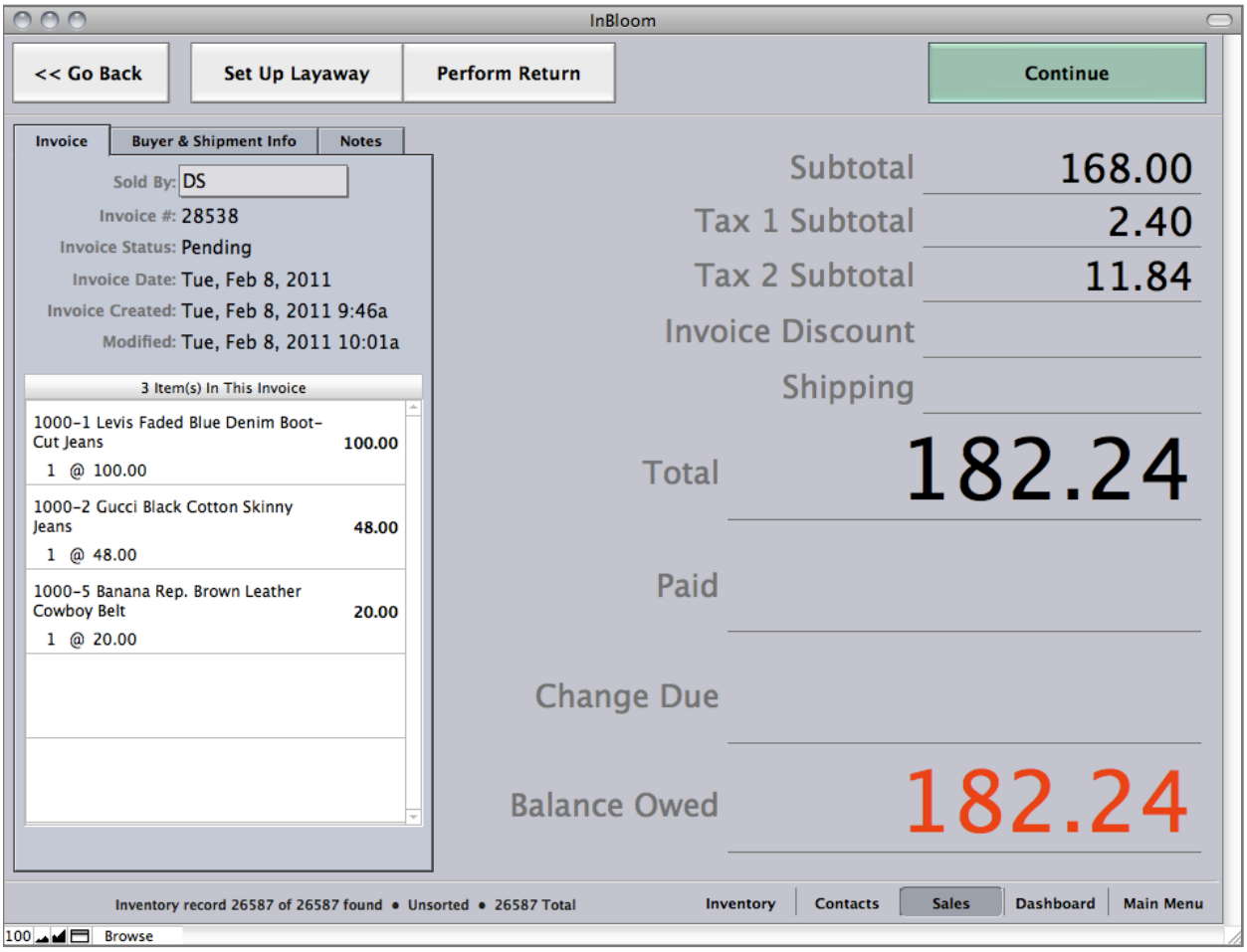
Point Of Sale



The Sales interface is designed to be straightforward and easy to use. You can do multiple sales functions (returns, discounts, layaways, store credits, emailing receipts, and more) from this part of InBloom and nearly all of it is managed through the toolbar buttons on the top of the window. You have an unlimited number of lines to add to sale, and can manage two different sales taxes for each particular item.

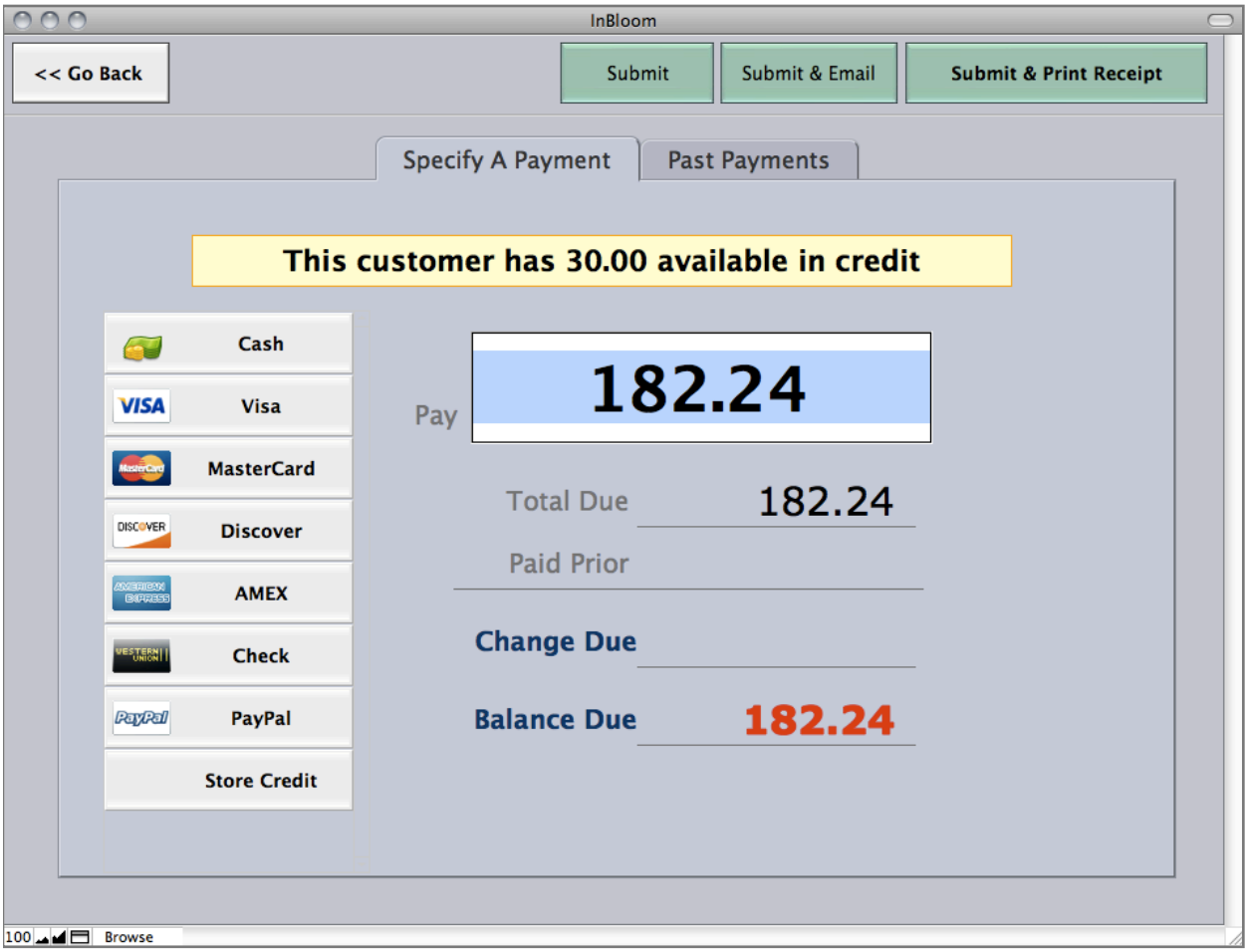
After you type or scan your inventory on the invoice, click **Continue**.

The Sale Confirmation Screen



InBloom will display the totals for this transaction in a confirmation screen. Here you can also specify additional information about the transaction, or change the sale into a return or a layway transaction. Click the **Continue** button to proceed.

The Sale Payment Screen

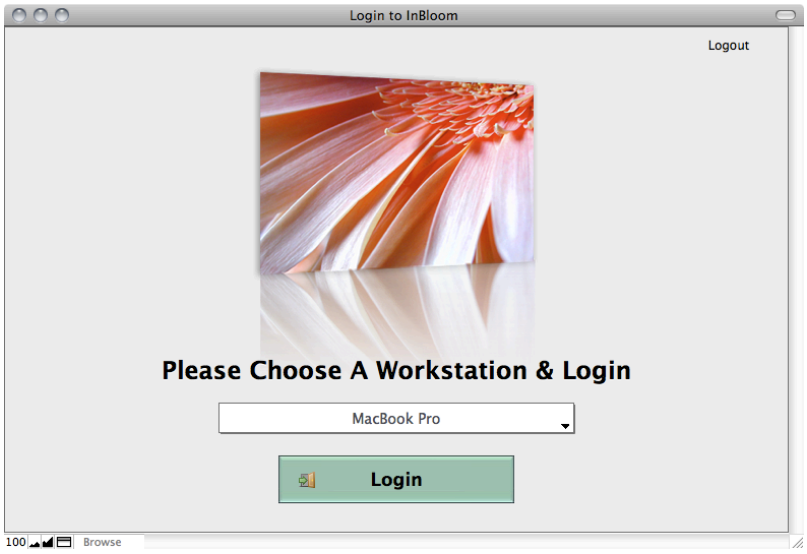


The final screen in writing a sale lets you specify the payments that were received, any change due the customer, and gives you the option of submitting the sale without any receipt, submitting the sale and emailing the receipt, or submitting the sale and printing the receipt to your receipt printer.

Software Guide

Logging In

Logging In To InBloom

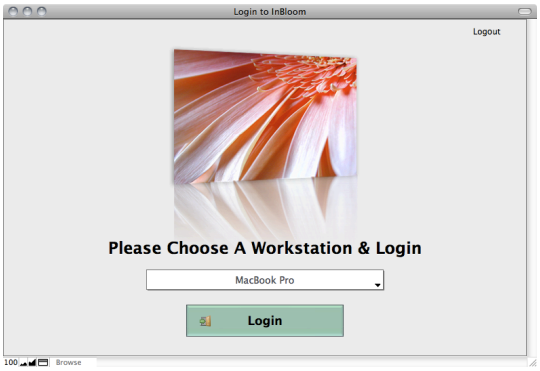


As soon as you open InBloom you'll be greeted with the login window. Select an option from the Workstations pulldown menu to make sure InBloom will auto-select the correct printers, then click **Login**.

In the password dialog, enter the username and password combo you specified when installing InBloom. If you don't remember the correct combo, see the Troubleshooting section of the manual for help on how to proceed.

If you or another user has already logged in and you want to login again (with a different access level, for example), simply choose the **Re-login** button on the top right of the Main Menu.

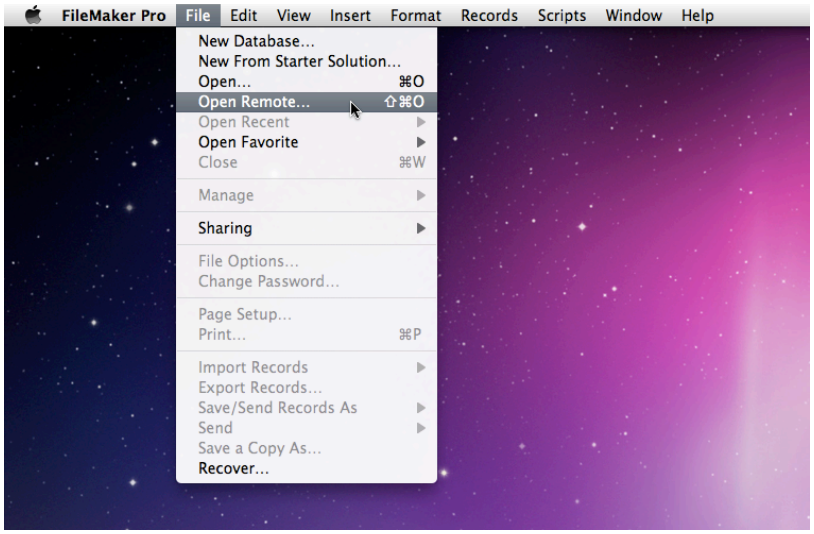
Logging In To InBloom Over A Network



If you're using InBloom in a multi-computer setup, you simply need to have the login window (above) open on the host machine, you don't need to fully login to let other users access InBloom over the network.

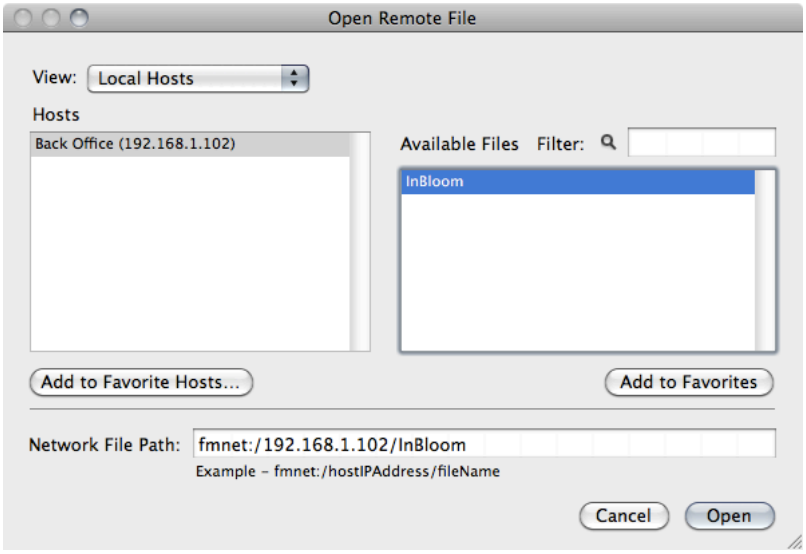
Across the network, on any client machines, users will login using FileMaker Pro:

1. Simply open FileMaker Pro on the remote/client computer



2. Go to the File menu and choose Open Remote

3. In the window named Open Remote File that appears, make sure the View menu on the top right is set to Local Hosts.



4. Click and highlight the available host machine under Hosts
5. Then click InBloom in the available files on the right
6. Click the Open button on the bottom right

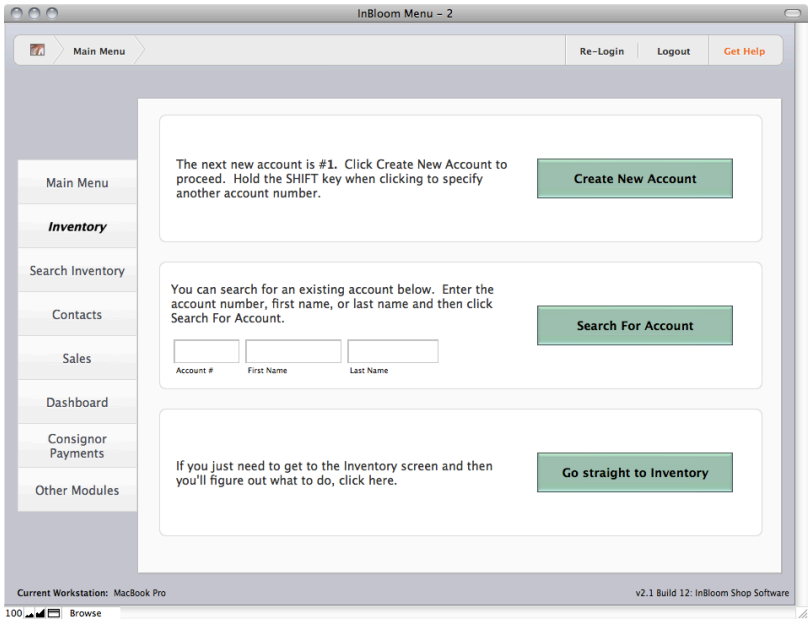
If you don't see your other computer under Hosts, in Step 3, make sure InBloom is open on that machine. Also make sure that sharing has been enabled on that file (Main Menu > Other Modules > click Share InBloom Data)

Inventory

Adding Inventory To A New Consignor

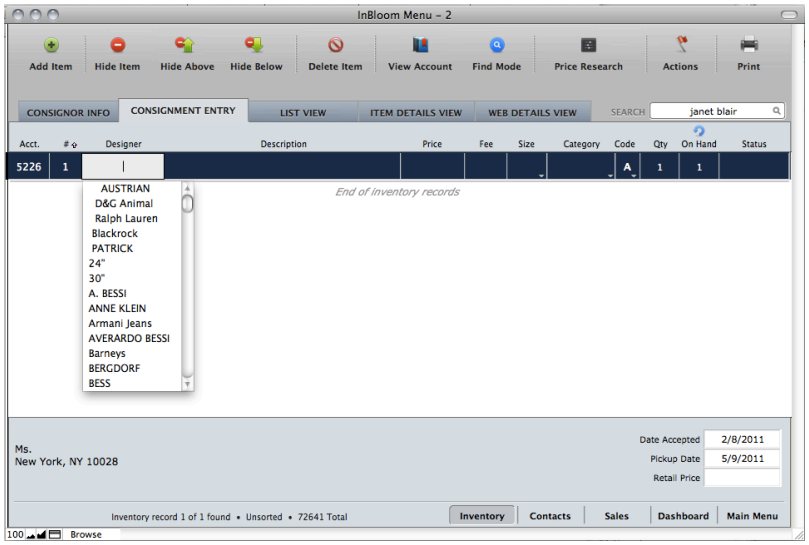
To begin adding inventory:

- Log in to your InBloom system and go to the Main Menu.
- Click the Inventory button to view the Inventory Menu.


InBloom Menu – 2
Main Menu
Re-Login
Logout
Get Help
Main Menu
Inventory
Search Inventory
Contacts
Sales
Dashboard
Consignor Payments
Other Modules
The next new account is #1. Click Create New Account to proceed. Hold the SHIFT key when clicking to specify another account number.
Create New Account
You can search for an existing account below. Enter the account number, first name, or last name and then click Search For Account.
Account #
First Name
Last Name
Search For Account
If you just need to get to the Inventory screen and then you'll figure out what to do, click here.
Go straight to Inventory
Current Workstation: MacBook Pro
v2.1 Build 12: InBloom Shop Software
100
Browse

- From here, you can create a new account, click **Create New Account**
- InBloom will show the Consignment Entry screen, create item #1 in the new account for you, and place the cursor in the Designer field.

- If you've already entered inventory in InBloom, a list of already used values from the Designer field will automatically appear.

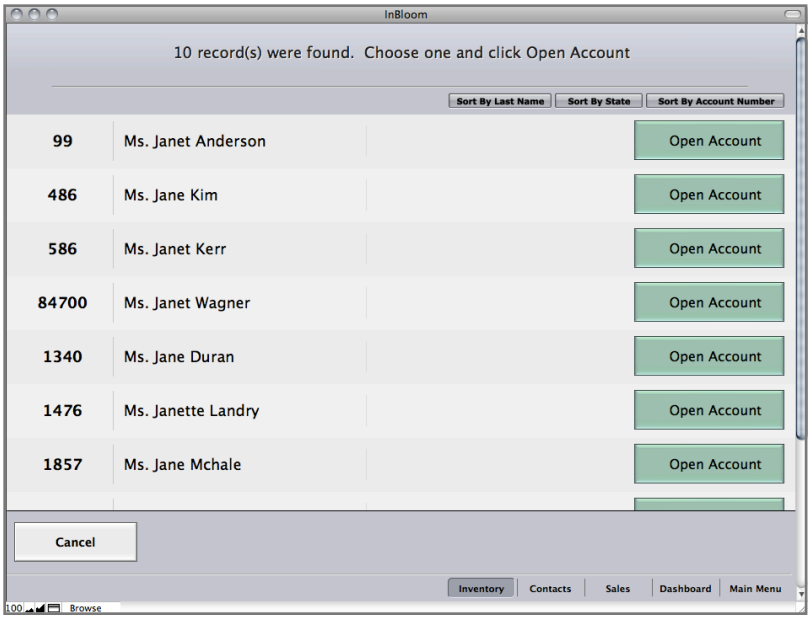


This is to aid in entering items quickly and avoiding entry errors.

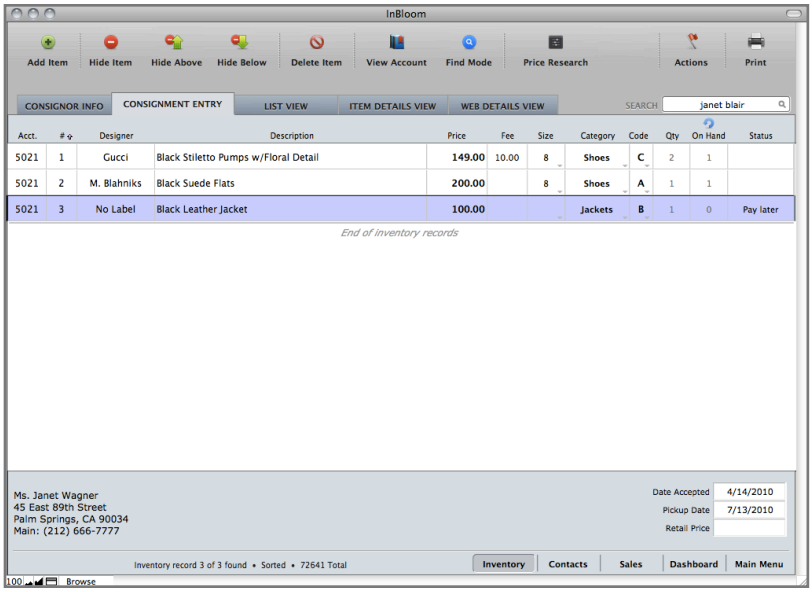
- Click the **Add Item** toolbar button to continue adding new items to the account. The shortcut is **Cmd**+**N** (on Mac) or **Ctrl +N** (on PC)

Adding Inventory To An Existing Consignor

- From the Inventory Menu (step 2 above), you can enter the consignor's existing account number, enter the first or last name, or not enter any criteria, and choose **Search For Account**



- From the list of results, click **Open Account** for the consignor
- InBloom will retrieve all of the items entered for the consignor



- Click the **Add Item** toolbar button to continue adding new items to the account. The shortcut is **Cmd**+**N** (on Mac) or **Ctrl +N** (on PC)

Searching For Inventory

You can search for Inventory using two methods:

- Search by using the **Search** field. This searches across all inventory for any matches in the Designer, Description, Account Number, and SKU fields.

  *For example: let's say you wanted to find all items for consignor **25**, you can simply type the number **25** in the Search field and hit Enter on your keyboard to perform the search.*

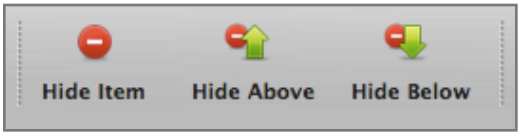
  *Here's another example: if you wanted to find all inventory items that are by the brand **Gucci**, simply type the word **Gucci** in the Search field, and hit Enter on your keyboard to perform the search. If you wanted to further narrow down your search for **Gucci** items in **white leather** that are in your inventory, you can simply type **Gucci white leather** and hit Enter on your keyboard to perform the*

- Search by using **Find Mode**. In Find Mode, you can build complicated finds easily (e.g. "Show me every pair of shoes that came after December 1, less than $150, in size 6 "). For full instructions, read about this mode in the Find Mode chapter.

Deleting Inventory

You can permanently delete inventory by clicking the Delete button on the inventory toolbar. This will delete any transactional history for the item as well.

Hiding Inventory



The **Hide** toolbar buttons remove the selected item from your view of the current set of Inventory. It's important to note: **they do not delete the items**, only temporarily hide them from the set of found records.

- **Hide Item** temporarily hides only the selected item.
- **Hide Above** temporarily hides the records **above** the selected item.
- **Hide Below** temporarily hides the records below the selected item.

Because InBloom modifies and prints whatever set of records you are viewing, you can print a mixed or partial list using the **Hide** buttons.

*For example: let's say you wanted to print only the new items for existing consignor **25**.*

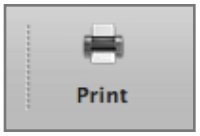
*First, you'll search for account 25. Let's say all the items after item #101 are the new items you'd like to print. Click on item 101 to select the record, and click **Hide Above**. This will omit the older records (1 thru 100) from the found set, now click Print.*

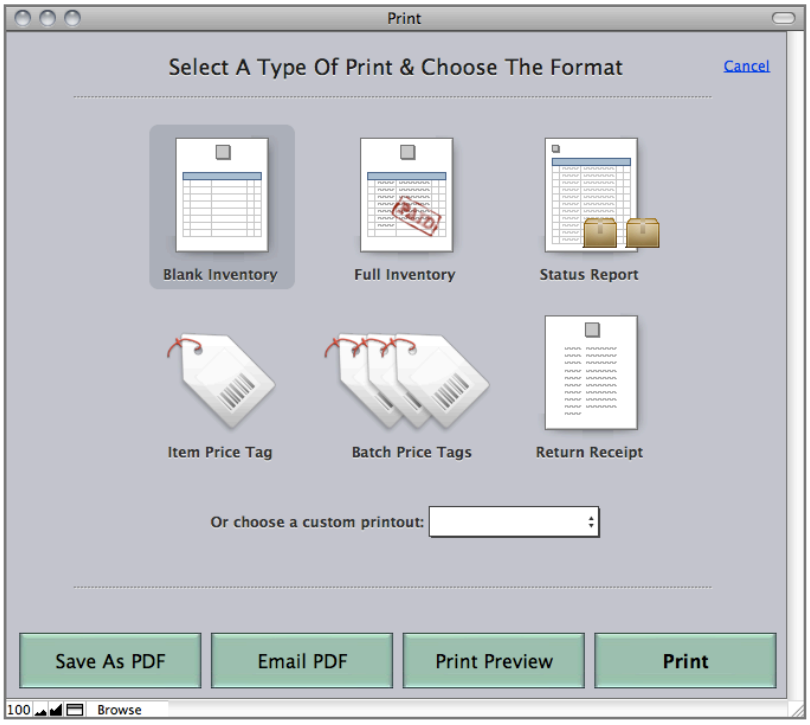
*If you wanted to print only the old items, you would click on item 101 and click **Hide Below** to omit the newer records.*

Printing & Emailing Inventory

You can print a number of different tags and forms for a single piece of inventory or for the full set of items you are browsing. This powerful method of browsing and printing lets you print and reprint selections of items very easily, without having to remember any specifics of the account. You simply print whatever record you have selected or whatever you are viewing.

You always begin printing by click **Print** on the toolbar (keyboard shortcut **Cmd+P** on Mac, **Ctrl+P** on PC). This will display the printouts selection window.

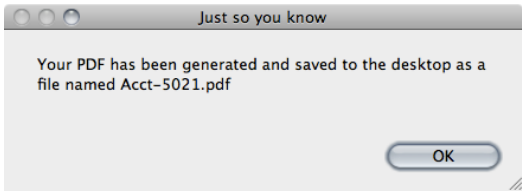




Simply choose the type of printout you would like to print, then choose **Print**. The standard print dialog will appear and InBloom will have selected the appropriate printer for the task (i.e. your label printer to print price tags). If InBloom did not automatically choose the correct printer, see the Troubleshooting section for more help.

You can also preview what the printout will look like before sending it to the printer, by clicking **Print Preview**.

If you click **Save As PDF**, InBloom will generate a PDF for the viewed items, save it to your desktop automatically, and display a confirmation alert.



The **Email PDF** button will generate a PDF and attach it to a new email in the default email program on your computer (i.e. Apple Mail on Mac and Outlook Express on PC). If you use a webmail provider such as

Hotmail, Gmail, or Yahoo, you must have an email program set up on your computer to use these services. InBloom can not generate a new email through your web browser.

The Different Printout Types

InBloom comes with several templates built in for inventory lists, contracts, price tags, and more. Here's a basic explanation of each printout type:

Blank Inventory

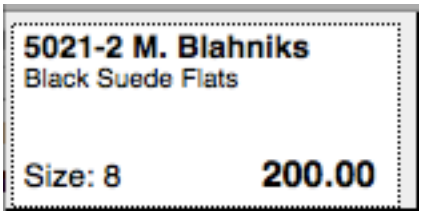
This is a simple inventory list with the consignor contact info and any contractual info displayed at the bottom. This printout does not print any sales data.

Full Inventory

A Full Inventory is an inventory list with the consignor contact info and any contractual info displayed at the bottom. All sales, return, and donation information is also displayed and printed.

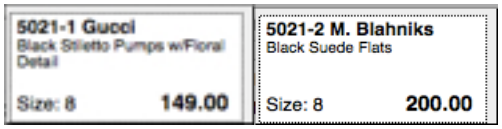
Status Report

A Status Report is a condensed list of inventory with basic info displayed, and no sales data. This is useful for retrieving items off the sales floor.



Item Price Tag

Prints a price tag for the currently selected inventory item to your label printer.



Bulk Price Tags

Prints multiple price tags for the set of currently viewed inventory items to your label printer.

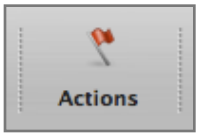
Return Receipt

Print two condensed lists of all viewed items in a tear-sheet for the consignor to sign then return, and one for them to keep.

Custom Printout

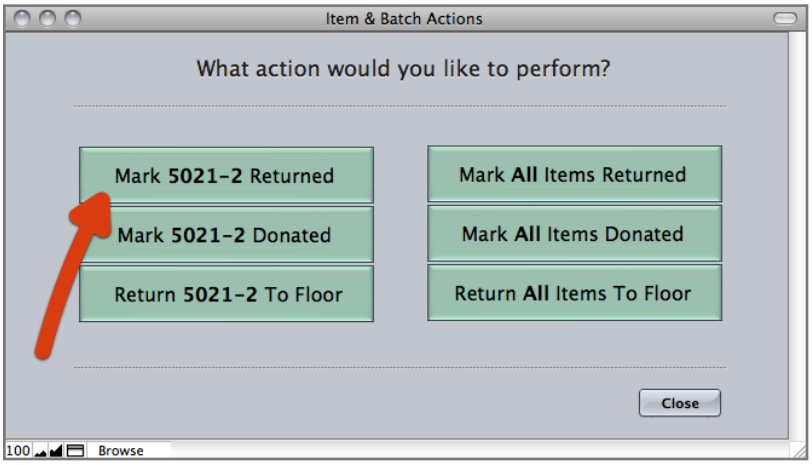
You can create your own unique inventory printouts with FileMaker Pro and have them appear here. This is useful if you want to print a specialized contract or special price tag that is not already included. See the section on Custom Printouts for more info.

Marking Inventory As Returned To Consignor

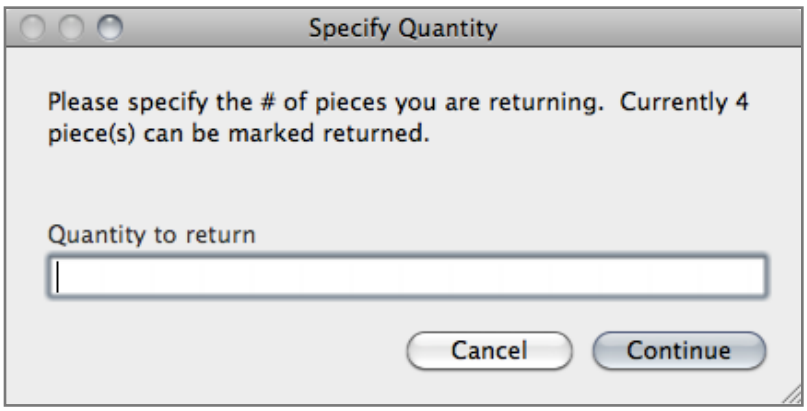


Frequently, consignment businesses will return items back to the consignor. Using the **Actions** toolbar button, you can note this for any piece of inventory in just two or three clicks.

Once you click the toolbar button, the Actions window will display the list of available operations.



Simply click the **Mark ... Returned** button (the item number will be shown in place of the ...) on the left to mark the currently selected item as returned. If there is more than one unit available, InBloom will ask you to confirm the number of pieces being returned.


Specify Quantity
Please specify the # of pieces you are returning. Currently 4 piece(s) can be marked returned.
Quantity to return
Cancel
Continue

Once you enter the quantity to return and continue, InBloom will mark the item as returned in your Inventory and note it in the Status field:

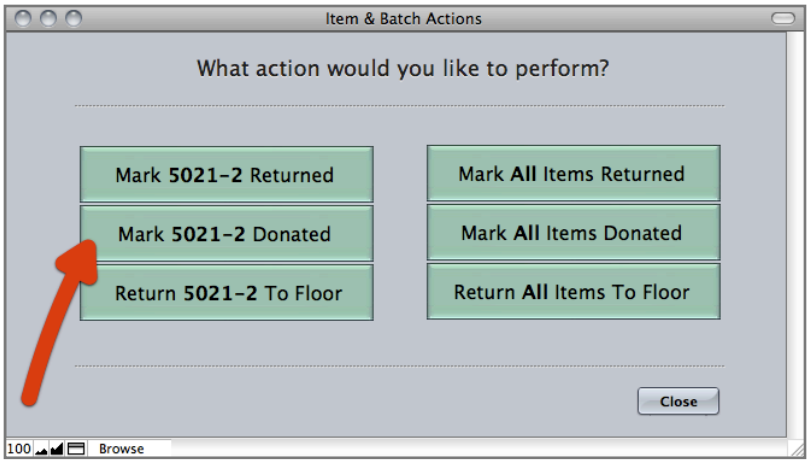
5021	2	M. Blahniks	Black Suede Flats	200.00		8	Shoes	A	4	0	Consignor return

If you would like to mark all of the outstanding items in the consignor's account as returned, you can instead click the **Mark All Items Returned** button to proceed. This will do it for any items that are available and being viewed. If you don't want to include any

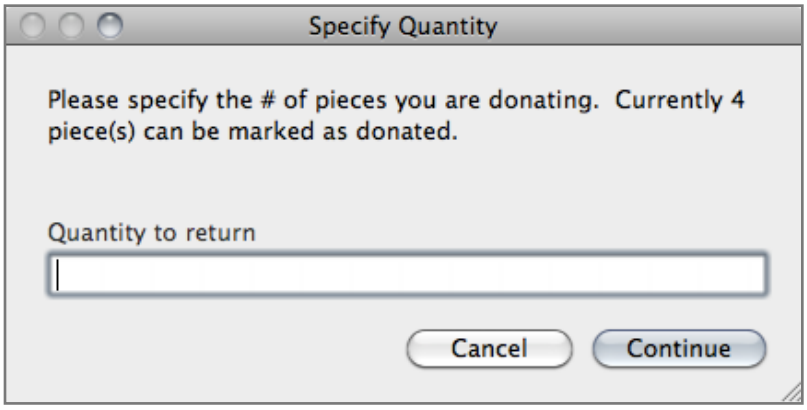
particular items, select each item to omit and click the **Hide** button in the toolbar.

Marking Inventory As Donated

If your business donates items to a third party, such as a non-profit charity, you can note this in your inventory using the **Actions** toolbar button as well.



Simply click the **Mark ... Donated** button (the item number will be shown in place of the ...) on the left to mark the currently selected item as returned. If there is more than one unit available, InBloom will ask you to confirm the number of pieces being returned.


Specify Quantity
Please specify the # of pieces you are donating. Currently 4 piece(s) can be marked as donated.
Quantity to return
Cancel
Continue

Once you enter the quantity to mark as donated and continue, InBloom will mark the item as Donated in your Inventory and note it in

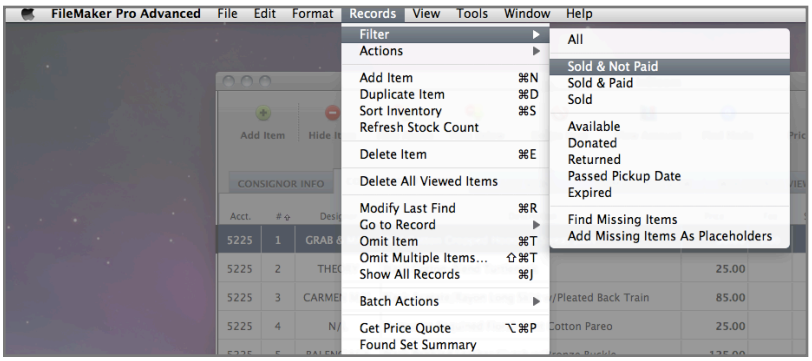
the Status field:

If you would like to mark all of the outstanding items in the consignor's account as returned, you can instead click the **Mark All Items Donated** button to proceed. This will do it for any items that are available and being viewed. If you don't want to include any particular items, select each item to omit and click the **Hide** button in the toolbar.

Filtering: How To Show Only Available / Sold / Paid / Unpaid / Donated Items

You can narrow down the filter of an inventory list to display items matching certain criteria. Simply go to the **Records** menu, choose **Filter**, then choose any filter criteria.

You can filter for sold inventory, sold and paid, sold and unpaid, available inventory, inventory marked as Donated, inventory marked as Consignor Return, inventory beyond the Pickup Date, and inventory that has been marked as Expired.

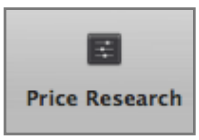


The Find Missing Items option is used to find out-of-sequence numbers in a complete inventory list (e.g. if you are looking at consignor #25 who has over 200 items and you want to determine if there is an item number deleted or removed from the account, you use the Find Missing Items option).

The Add Missing Items As Placeholders option is deprecated from InBloom 2.1 and is no longer necessary.

Researching Inventory Prices Automagically

You can research the historical trend of similar inventory using the **Price Research** button on the toolbar. This will display the Price Research dialog and place the cursor in



the price research field. Here, you you can type keywords for inventory to investigate price trending such as the average starting price, average selling price, duration on the sales floor, and more.

To perform a research query, simply click the **Price Research** button on the toolbar, type your keywords, then hit **Return** or **Enter** key on your keyboard. InBloom will look for any exact text matches from the Designer and Description fields and update the dialog window.

InBloom Price Research
Enter some keywords for the item you would like to research the price of, in the field below:
Of Items Found:
Of Items Sold: 347 items
Sold Percentage: 79.95%
Average Duration In Store:
Average Start Price:
Start Price Range: 0.00 to 500.00
Average Sold Price:
Sold Price Range: 4.00 to 400.00
Browse Search Results
Close
100
Browse

Before Entering Search Criteria

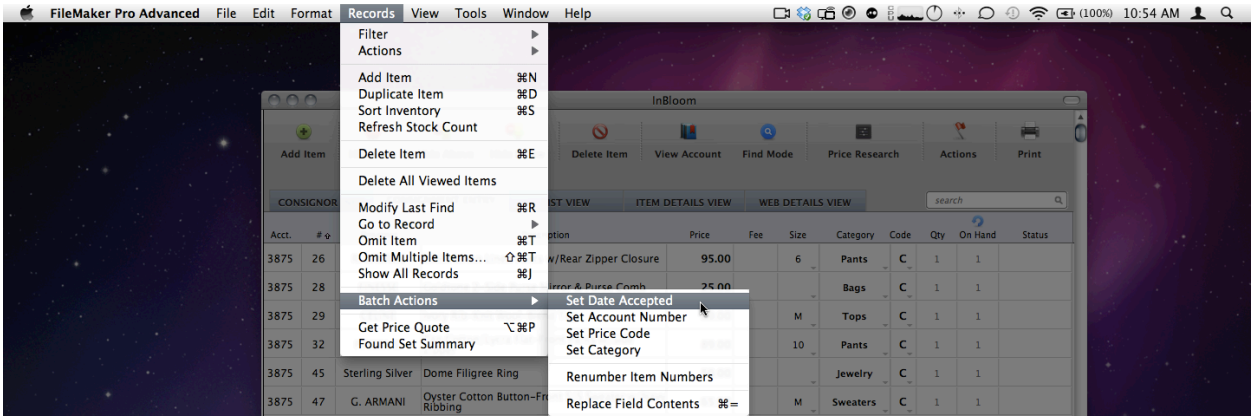
InBloom Price Research
Enter some keywords for the item you would like to research the price of, in the field below:
blue jeans
Of Items Found: 434 items
Of Items Sold: 347 items
Sold Percentage: 79.95%
Average Duration In Store: -4125.46 days
Average Start Price: $4.29
Start Price Range: 0.00 to 500.00
Average Sold Price: 41.97
Sold Price Range: 4.00 to 400.00
Browse Search Results
Close
100
Browse

After Entering Search Criteria

If you'd like to see what results were used to generate the figures, click the **Browse Search Results** button.

*For example: let's say you wanted to research the price of blue jeans. Simply type **blue jeans** in the Price Research field and hit the Enter key to perform the query. If you wanted to refine the results, simply enter an additional keyword in the field, such as **Wrangler blue jeans**.*

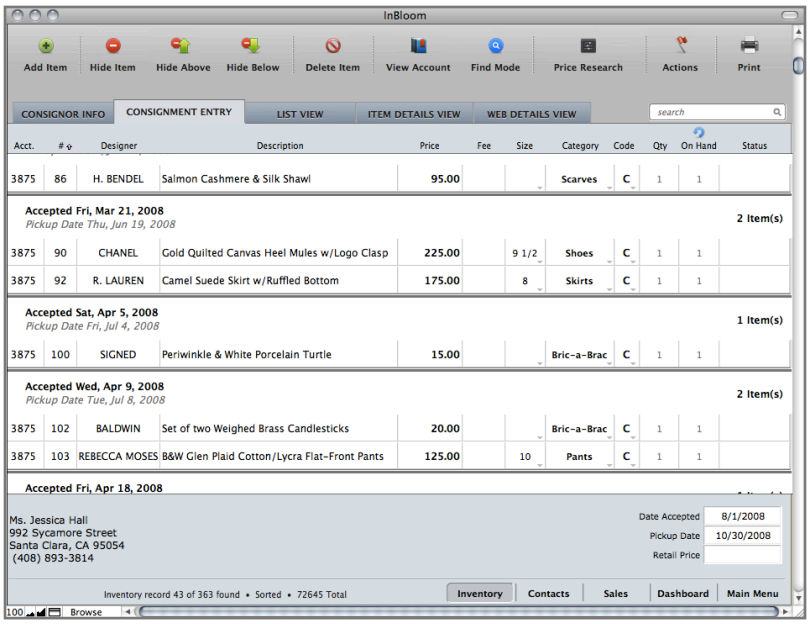
Changing Inventory Dates, Price Codes, & More in Batches



If you need to change the Date Accepted, Price Code, Account Number, or Category for a batch of items, there are shortcuts to help do this quickly and easily. Simply narrow down the records you want to change, then go to the Records menu, choose Batch Actions, then *Set Date Accepted, Set Account Number, Set Price Code, or Set Category* from the list of available options. **It's important to first narrow down the records you are viewing when performing one of these Batch Actions, otherwise you can accidentally edit all of the records in your Inventory. Any batch changes can not be undone.**

You can also renumber items in an account if you want them to be grouped numerically by a certain criteria, such as sorting by Designer, then renumbering so all of the brands are grouped. To perform this action, choose *Renumber Item Numbers* from the Batch Actions menu.

Easy Sorting & Visual Browsing


InBloom
Add Item
Hide Item
Hide Above
Hide Below
Delete Item
View Account
Find Mode
Price Research
Actions
Print
CONSIGNOR INFO
CONSIGNMENT ENTRY
LIST VIEW
ITEM DETAILS VIEW
WEB DETAILS VIEW
search
Acct. # Designer Description Price Fee Size Category Code Qty On Hand Status
3875 86 H. BENDEL Salmon Cashmere & Silk Shawl 95.00 Scarves C 1 1
Accepted Fri, Mar 21, 2008
Pickup Date Thu, Jun 19, 2008
2 Item(s)
3875 90 CHANEL Gold Quilted Canvas Heel Mules w/Logo Clasp 225.00 9 1/2 Shoes C 1 1
3875 92 R. LAUREN Camel Suede Skirt w/Ruffled Bottom 175.00 8 Skirts C 1 1
Accepted Sat, Apr 5, 2008
Pickup Date Fri, Jul 4, 2008
1 Item(s)
3875 100 SIGNED Periwinkle & White Porcelain Turtle 15.00 Bric-a-Brac C 1 1
Accepted Wed, Apr 9, 2008
Pickup Date Tue, Jul 8, 2008
2 Item(s)
3875 102 BALDWIN Set of two Weighed Brass Candlesticks 20.00 Bric-a-Brac C 1 1
3875 103 REBECCA MOSES B&W Glen Plaid Cotton/Lycra Flat-Front Pants 125.00 10 Pants C 1 1
Accepted Fri, Apr 18, 2008
Ms. Jessica Hall
992 Sycamore Street
Santa Clara, CA 95054
(408) 893-3814
Date Accepted 8/1/2008
Pickup Date 10/30/2008
Retail Price
Inventory record 43 of 363 found • Sorted • 72645 Total
Inventory
Contacts
Sales
Dashboard
Main Menu
Browse

You can click on any field names to sort by that field, when browsing Inventory. InBloom will provide some basic visual grouping to aid in showing the next item in your sort. In the screenshot above, the user has clicked on the *Date Accepted* field to segregate items based on when they were entered. This form of quick sorting is useful when browsing items from multiple accounts or with multiple search criteria.

Capturing Inventory Information

The InBloom database maintains several points of data about your Inventory. All of these fields are distributed between the Consignor Info, Consignment Entry, and Item Details View screens. Here are all the fields and their functionality:

Field	Functionality
Account Number	Every piece of inventory must have an account number in order to be part of a consignor's account e.g. 1000, 1289
Audit Log	A prefilled capture of all changes made to the record since it was created.
Category	A text field that has can have values chosen from the Category pulldown menu. The menu options can be changed in Settings.
Consignment Duration	The number of days the item is consigned for. This is set by the default from the Consignor Info tab, or from the Settings.
Consignor Minimum	The minimum amount to be paid to the consignor for an item, if it sells. This is useful when consignor's give you the ability to maneuver prices to help an item sell, that may not be outlined in your Price Code.
Current Price	A number field used to store the price an item has been reduced to because of the Price Code. Reductions are triggered by the Markdown Report in Reports.
Custom Fields 1 thru 10	A set of 10 text fields that can be customized to store information that InBloom hasn't been set up for by default.
Date Accepted	A date field that is automatically filled on the date the inventory record is created
Default Markdown Schedule	The default Price Code to be entered for each new piece of inventory (found in the Consignor Info tab)
Description	A text field that is designed to store a lengthy description of your inventory item.
Designer	A text field that is designed to store brand names of inventory. InBloom generates a pop-up list of the unique values in this field when you are entering inventory.
Item Fees	Any fees to be removed from the consignor's portion of the sale of an item e.g. if you have a 60/40 split with consignors, a 5.00 fee, and the item sells at 100, the consignor will receive 40.00 - 5.00 = 35.00
Item Number	The place number in the consignor's account for each piece of inventory e.g. 1, 2, 3, 4, ... 88, 89, 90. The next used item number is set by the default from the Consignor Info tab.

Field	Functionality
Markdown Schedule	A prefilled explanation of when the price is to be reduced on any piece of inventory e.g. **Price Code A** After 1/1/2011 the price will be 30.00 with a store/consignor split of 50/50 After 1/31/2011 the price will be 24.00 with a store/consignor split of 50/50 After 3/2/2011 the price will be 12.00 with a store/consignor split of 50/50 After 4/1/2011 the price will be 12.00 with a store/consignor split of 50/50 After 5/1/2011 the price will be 12.00 with a store/consignor split of 100/0
Next Item Number	A number field used the next item to be used when adding inventory to an account.
Pickup Date	A date field that is auto-calculates by adding the Consignment Duration field to the Date Accepted. e.g. if the Consignment Duration is set to 90 for an item accepted on January 1, the Pickup Date will be April 1.
Price Code	A text field that has can have values chosen from the Price Code pulldown menu. The Price Codes contain the store/consignor split for the item, the reduction schedule (if any), and menu options can be changed in Settings. This is set by the default from the Consignor Info tab, or from the Settings.
Purchase Price	A number field used to store your purchase price of the item.
Retail Price	A number field used to display a retail price on the price tags of inventory.
Size	A text field that has can have values chosen from the Size pulldown menu. The menu options can be changed in Settings.
SKU	A combination of the Account Number & Item Number fields, separated by a dash "-" e.g. 1000-1, 1000-2, 1000-3
Starting Price	The initial price of the item.

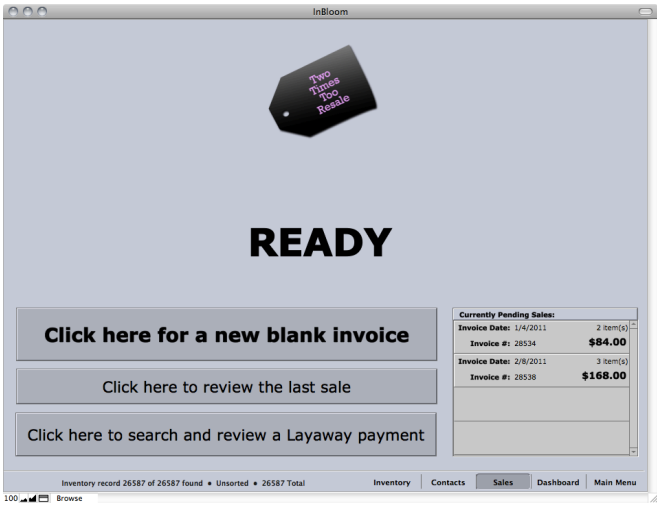
Field	Functionality
Time Accepted	A time field that is automatically filled at the time the inventory record is created.

Sales

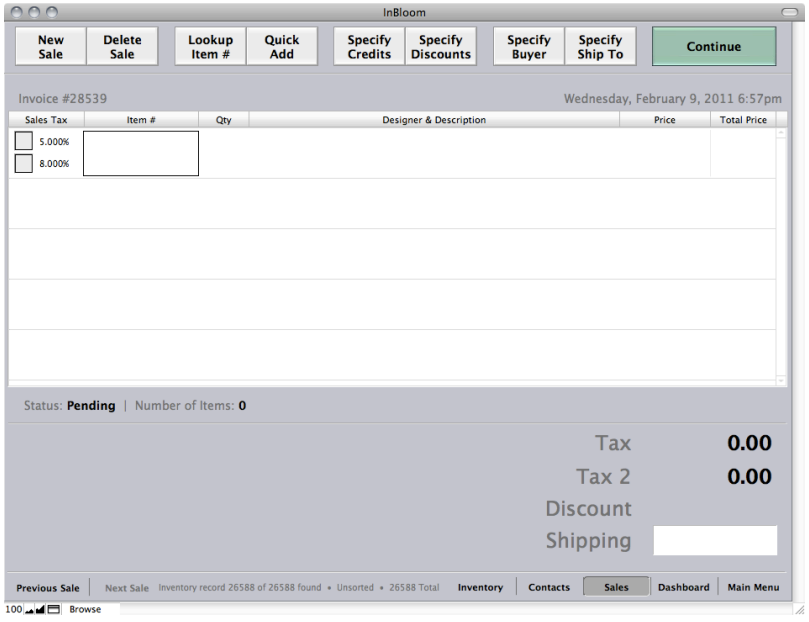
Writing Sales

To begin creating a new invoice to post a sale:

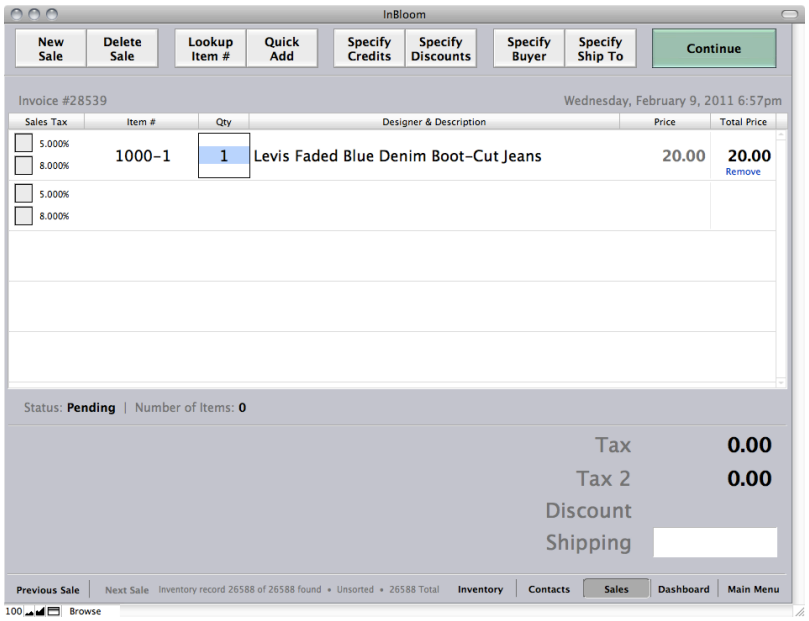
- Log in to your InBloom system and go to the Main Menu.
- Click the Sales button to view the **Ready** screen. If you are logged in as an Administrator, you may see the Sales menu, click Write New Sales to view the **Ready** screen.



- Click the **Click here for a new blank invoice** button to create a new sale invoice and put InBloom in a ready state for item entry. You can immediately start typing or scanning a SKU to begin itemizing your invoice:



- Begin typing your item numbers and hit either the Enter or Tab keys on the keyboard to move the cursor to the price field. Upon doing so, InBloom simultaneously looks up the description and current price:

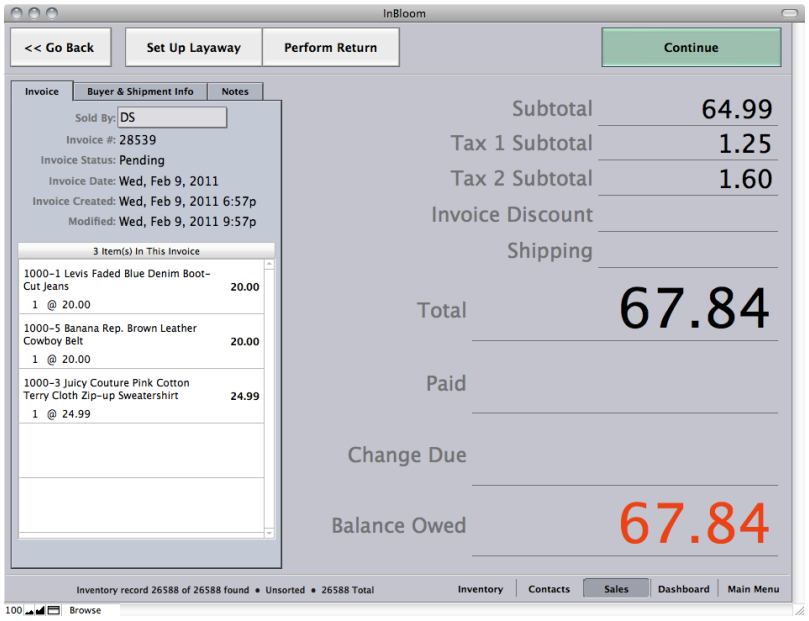


Note that InBloom is auto-calculating the price of the item based on Date Accepted field in Inventory and the item's reduction schedule according to the Price Code field.

If any corrections need to be made in the price, you manually type in the price at which to sell the item. Otherwise, hit the Enter or Tab key on the keyboard to go to the next item row.

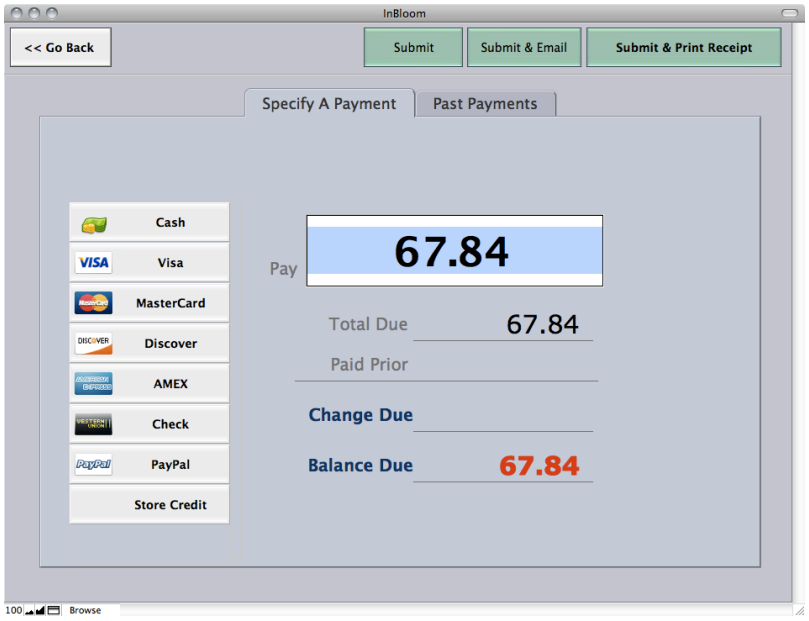
- Tax can be added to every item on the invoice automatically (through Settings) or you can manage this on an item-by-item basis by clicking the appropriate Sales Tax percentage checkbox on the left.
- You have an unlimited number of lines to add to an invoice, simply repeat the previous two steps for every item you would like to sell.

- If you mistype an item or there is an inventory error, InBloom will alert you immediately by displaying a warning line for that item.
- Click **Continue** to proceed to the Confirmation screen. InBloom will now display the invoice totals.



- After you review the invoice totals, click the **Continue** button.
- On the Payments screen, you can break down the forms of payment received for this transaction. You can record receiving various forms of payment such as credit cards, cash, check, and more.

  Note the Pay field has the Invoice total and is already selected, you simply need to change the amount to what is being paid, and click on the form of payment to record receiving it.

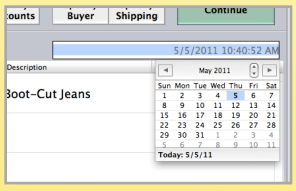


In the pictured example, we have a total bill of 67.84, if we wanted to record 30.00 received as Visa, 20.00 received as American Express, and 17.84 we would type, as follows:

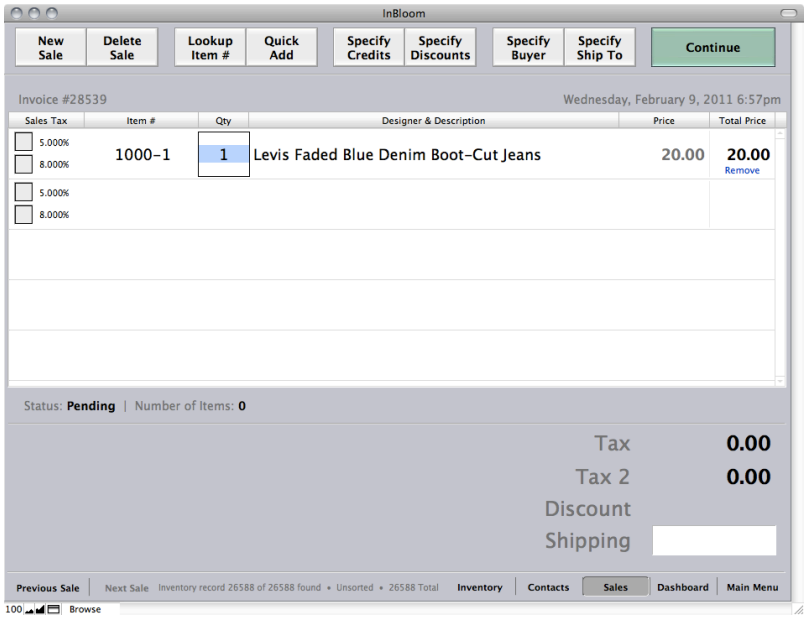
- Type "30", then click **Visa**
- The display will update with a balance of 37.84
- Type "20", then click **AMEX**
- The display will update with a balance of 17.84
- Click **Cash**

- Now that we have recorded all of the payment received, we click **Submit & Print Receipt**

You can change the date on an invoice before submitting it by clicking on the date in the invoice view. A calendar will display to help choose an alternative date for the invoice.

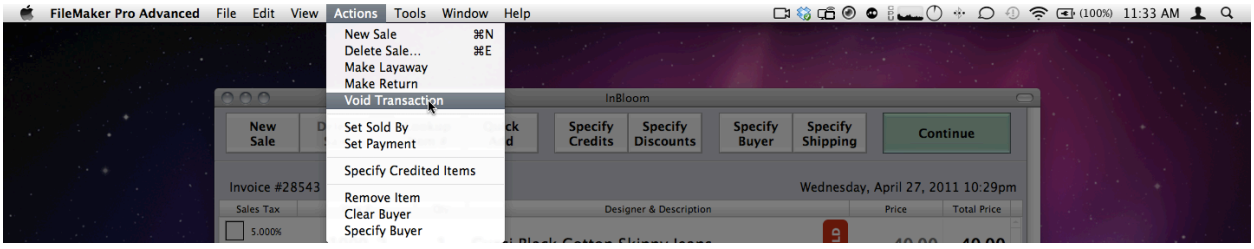


Deleting & Voiding Sales



You can delete sales if they have not been posted and have a Pending status, as in the screenshot above. Simply click the **Delete Sale** button.

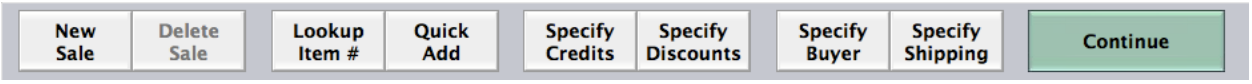
If the sale transaction has been processed, you must void the sale. To begin, simply navigate to the sale you would like to undo, then go to the Actions menu and choose **Void Transaction**.



How To Email A Sales Receipt

Click the **Submit & Email Receipt** button on the Payments screen to generate a PDF receipt and attach it to your default email client.

Advanced Point Of Sale Functionality



At the top of the Sales screen you can use the Point Of Sale toolbar. The buttons give you quick access to basic functionality and are further described below:

Toolbar Button	Function
New Sale	This button will simply create a new sale invoice and prepare for item entry.
Delete Sale	Deletes the sale from the list of invoices.
Lookup Item Number	Guides the user through quickly searching the inventory for a particular item and automatically adding it to the current invoice.
Quick Add	Guides the user through adding new items to the inventory database while simultaneously adding them to the current invoice.
Specify Credits	Displays the Specify Credits screen where the user can specify payments for sold inventory items that can be used as credit for purchases.
Specify Discounts	Displays the Discount Manager screen that lets you manage applying bulk price reductions to all the items on an invoice or adding it as a flat reduction from the invoice.

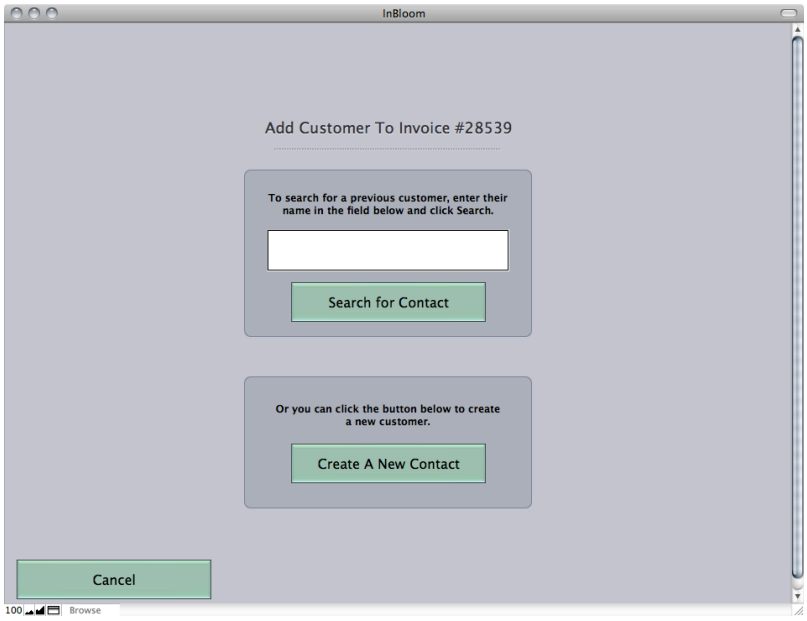
Toolbar Button	Function
Specify Buyer	Guides the user through quickly specifying a new or existing buyer name and address on the current invoice.
Specify Shipping	Guides the user through quickly specifying a new or existing name and shipping address on the current invoice.

On the sales confirmation screen, you have two more toolbar buttons:

Set Up Layaway	Displays the Layaway Entry screen and guides the user through details related to denoting a sale paid in multiple increments.
Perform Return	Displays the Return Entry screen and guides the user through accounting for item returns and returning credit to the customer.

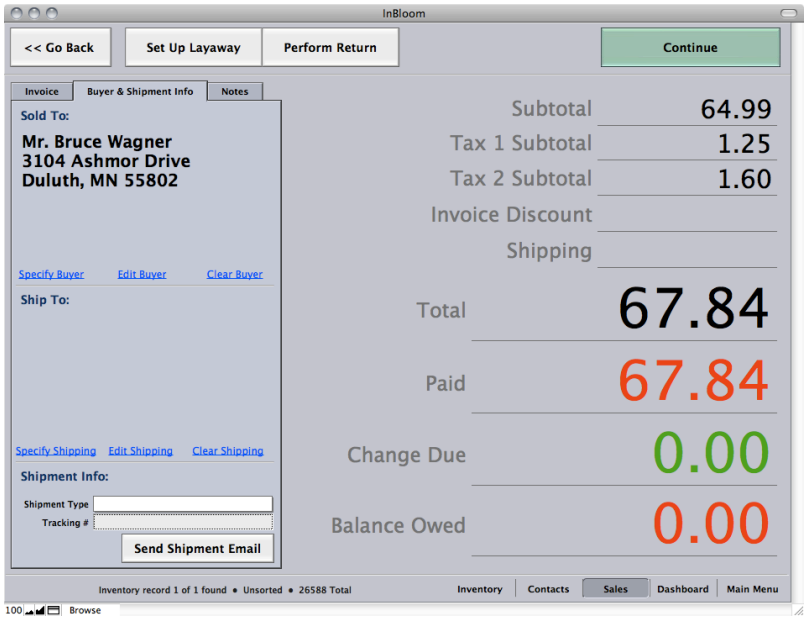
Adding Customers To An Invoice

By default, when you create a new sale, no customer is assigned, making it an anonymous sale. To add a customer, click the **Specify Buyer** toolbar button. When the Add Customer screen appears, you can search for an existing contact or create a new contact and automatically assign them as the customer for the invoice.


InBloom
Add Customer To Invoice #28539
To search for a previous customer, enter their name in the field below and click Search.
Search for Contact
Or you can click the button below to create a new customer.
Create A New Contact
Cancel
100
Browse

Adding Shipment Info To An Invoice

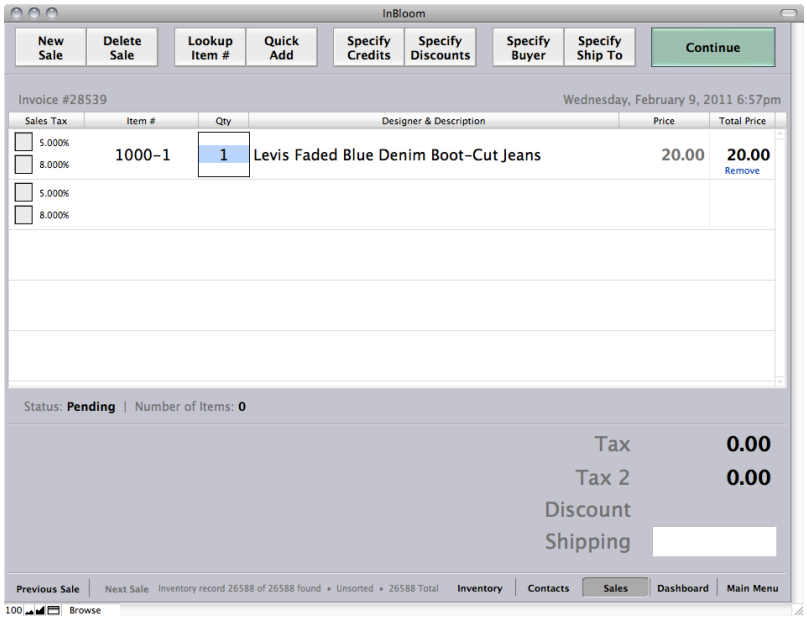
By default, when you create a new sale, no shipping info is assigned. You can specify or clear shipment info by clicking the **Specify Shipping** toolbar button or by going to the Buyer & Shipment Info tab at the top of the sales Confirmation screen and clicking the Specify Shipping link.

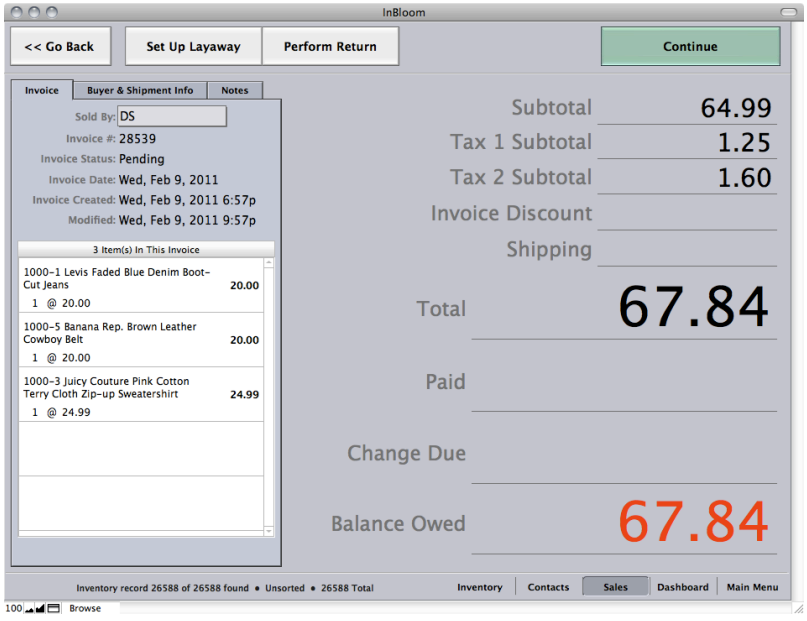


You can also record the Shipment Type and a tracking number with the sale. These two fields appear on the receipt when they have data. Clicking **Generate Shipment Email** will generate a new email in the default email program on your computer with a pre-formatted message denoting Shipment Type and tracking info. See the section on the Customization tab of the Settings module to read more about customizing that email template.

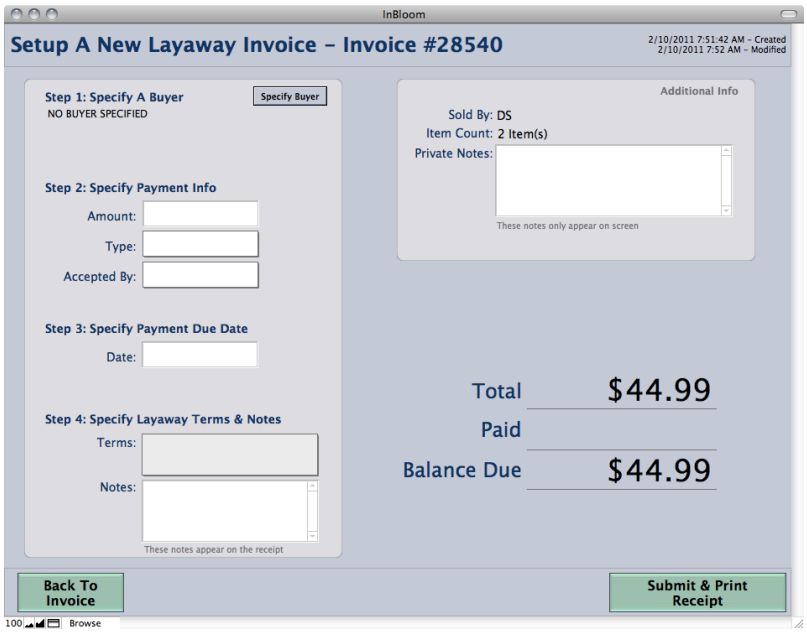
How To Write A Layaway Sale

Before a sale has been full transacted, you can convert it to a Layaway transaction. To begin, enter your items on the Invoice screen as you would normally. Add all of the items you would like to put on layaway to the invoice, click **Continue** to go to the Confirmation screen.





At the top of the Confirmation screen, click **Set Up Layaway** to begin setting up the invoice as a layaway.



The Layaway Setup screen which walks you through the four steps of preparing this transaction as a Layaway:

Step 1: Specify the customer to be assigned to this transaction. You must enter a name and address.

Step 2: Specify the deposit amount received, the payment type, and who accepted it (usually your own name).

Step 3: Specify the due date of the next payment.

Step 4: Specify any layaway terms you would like printed on the sales receipt from the Terms pulldown menu. (You can modify the list of Layaway Terms & Conditions options in the Sales tab of the Settings module.)

In addition, there is a Private Notes field which lets you add any comments and notes for store / personnel use. These notes do not appear anywhere but on screen and are designed to help you keep

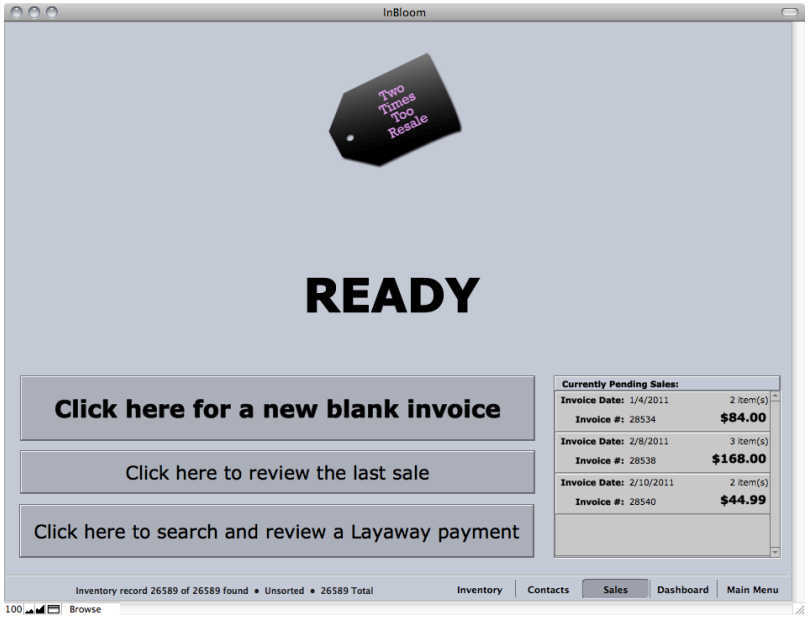
track of pertinent info without having to resort to scrap paper or yellow sticky notes.

All four steps are required and must be completed before proceeding. Hit the **Submit & Print Receipt** button on the bottom right when complete.

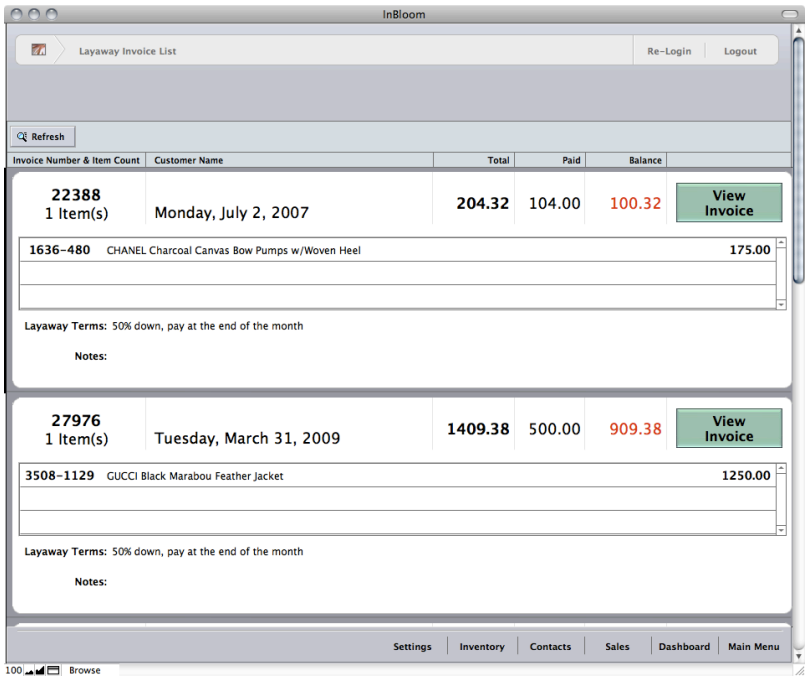
Making Additional Layaway Payments

After setting up a Layaway Transaction, you can always find it in the Layaway Browser from any Point-of-Sale window.

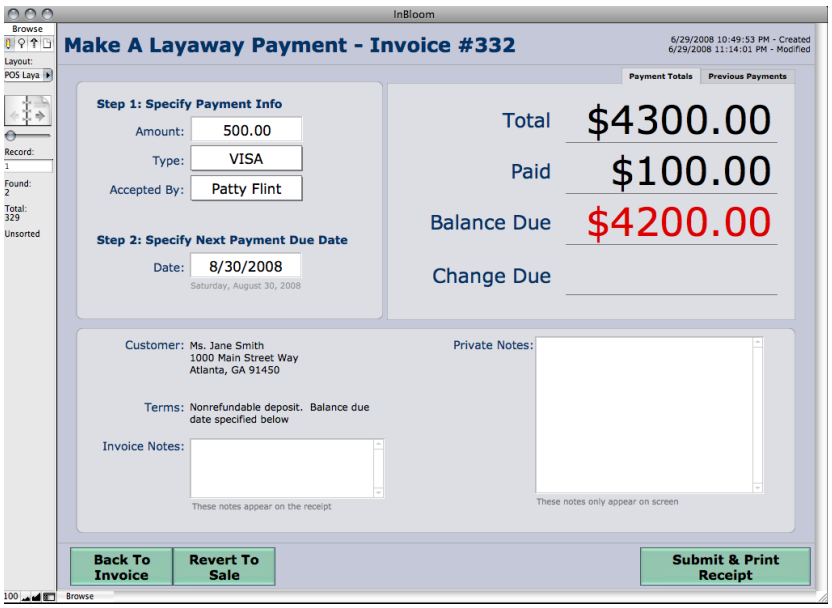
- Click the **Click here to search and review a Layaway payment** button at the bottom of the Ready screen.



- You will immediately see any Layaway transactions in the Layaway Invoice List. Click the **View Invoice** button on the transaction you would like to add a payment to.



- This will display the Layaway Payment screen.



Simply specify the additional payment deposit in Step 1, then enter the following payment due date in Step 2. If you need to correct any

previous payments, you can edit the past payments from the Previous Payments tab on the top right. Otherwise, click the **Submit & Print Receipt** button on the bottom right.

In the case of the sample transaction above, the shopper has already placed a $100 initial deposit towards the $4300 Layaway invoice. In this following payment s/he will be adding an additional $500 deposit to the invoice.

The ability to modify both the Customer and Terms & Conditions for this invoice have been locked. To change any of these requires clicking the **Revert To Sale** button on the bottom left, and making changes in standard invoice mode.

This Layaway Payment screen is designed for multiple visits as the deposits for the Layaway Transactions successively pay the balance down. As soon as the Layaway Invoice has been fully paid, the Invoice Status changes from "Layaway" to "Layaway Purchase" and the Transaction Status field in Inventory for all sold items, changes from "Layaway" to "Purchased"

Returning Merchandise

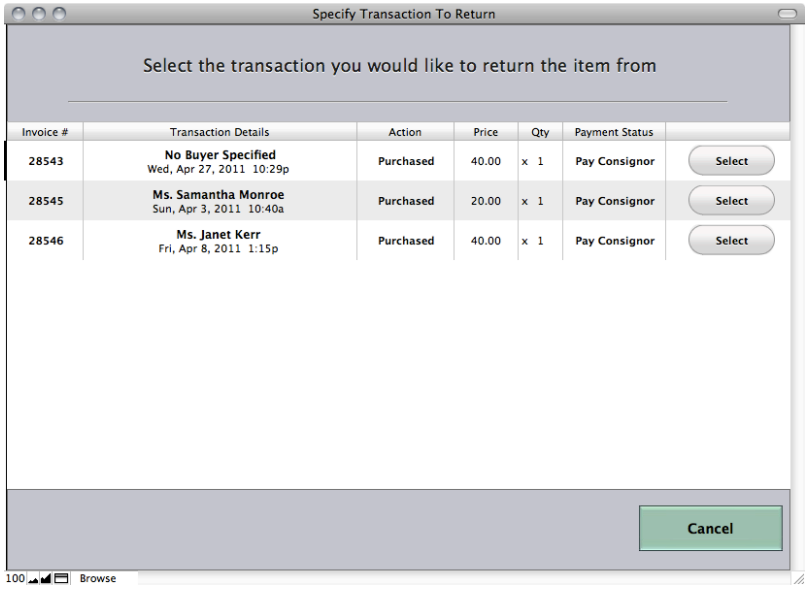
There are multiple ways to return merchandise in InBloom. Because accounting can be significantly more complicated with consignment

items, you can only return items sold through InBloom where the consignor has not been paid for the sale of the item.

Solution 1: Returning Items & Selling Items In A Mixed Transaction

Most customers will generally return items and put the store credit towards the purchase of another item at the same time. This creates mixed transactions where a sale invoice may have one or more items being sold while simultaneously having one or more items being returned. InBloom handles this gracefully for you.

- To start, enter the SKU and price in the default Point Of Sale Entry screen as you would normally.
- Then, add the item(s) being returned but give the item(s) a negative quantity, such as -1.
- Click the **Continue** button to proceed to the Confirmation screen.

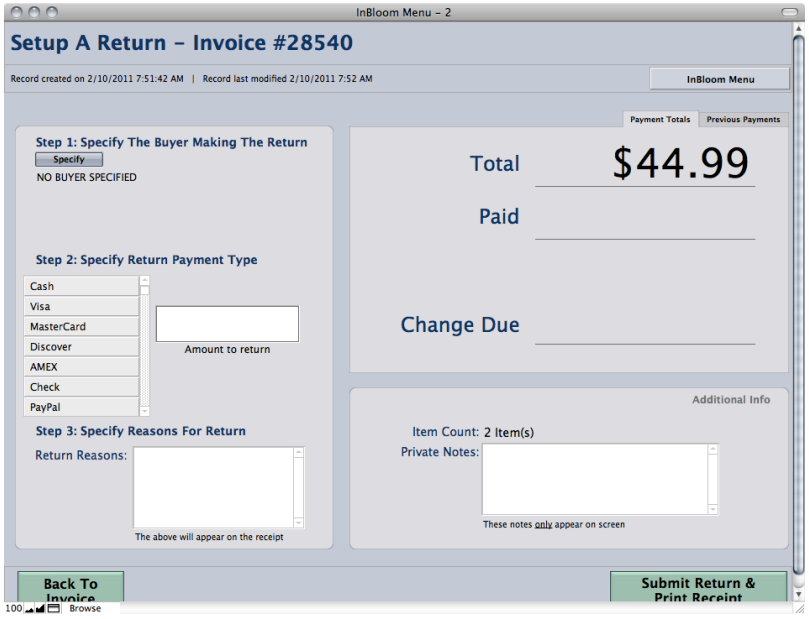


- InBloom will display a popup window to select the transaction where the item was originally sold. Choose the appropriate item by clicking the **Select** button on the right of the item.
- The view will return to the pending sale, click **Continue** to proceed through the sale transaction as you normally would.

Solution 2: Writing A Return-Only Transaction

Return transactions can easily be handled by InBloom and begin much in the same way as Layaway transactions above.

- To start, enter the sale information for any of the items to be noted as returned in the default Point Of Sale Entry screen.
- Click the **Continue** button to proceed to the Confirmation screen.
- Click the **Perform Return** button on the toolbar.
- You'll now see the Return Setup screen.

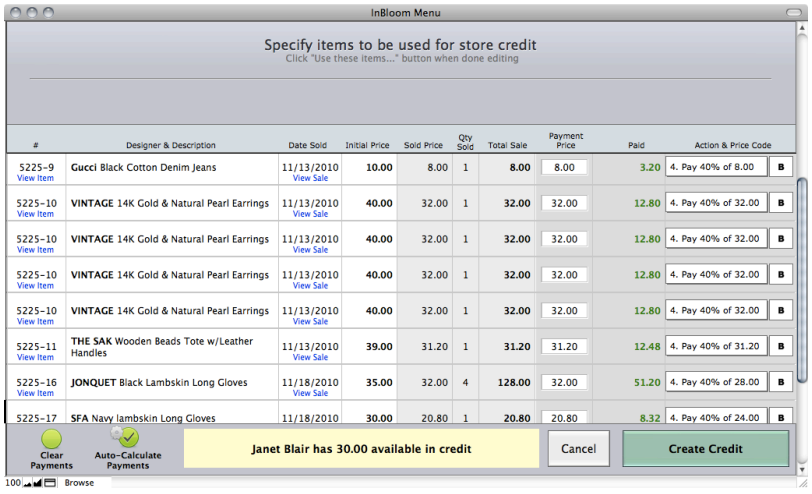


- Simply specify the customer info for the return in Step 1.
- Enter amount being returned in Step 2.
- Click the **Submit Return & Print Receipt** button.

Giving Customers Store Credit

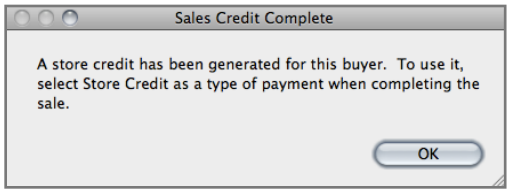
You can create store credit for consignors using the sale of their item towards a new purchase. If they do not have any merchandise sold, InBloom can **not** generate a store credit in advance. You can use the credit, when writing a sale.

- To begin, you must first assign the consignor to the sales invoice. Click Specify Buyer in the toolbar, find their record, and specify them as a buyer.
- Next, click the **Specify Credits** button on the toolbar.
- If any sold items are available for credit, InBloom will present them in a list format.

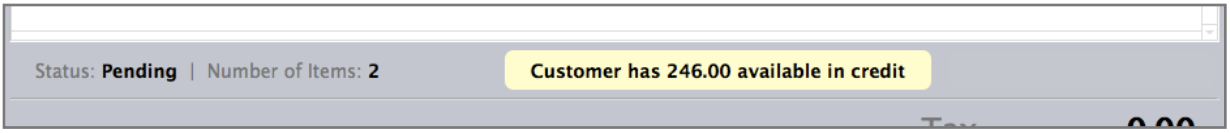


- Click the **Auto-Calculate Payments** button on the bottom left to have InBloom calculate payment for each item.

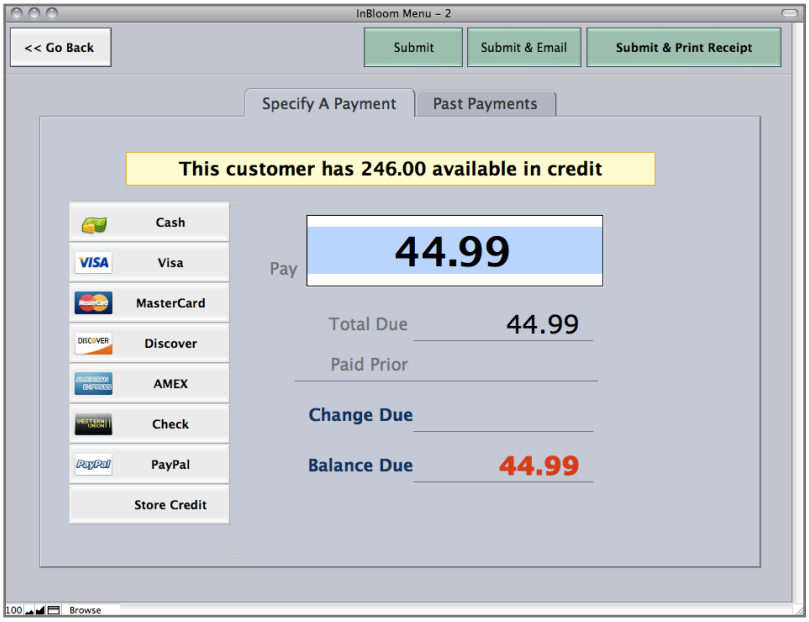
- Once the correct credit amount has been specified, click the **Create Credit** button on the bottom right.
- A confirmation dialog will appear and the proper amount will now be stored as a credit in the consignor's account. Click **OK** to proceed.


Sales Credit Complete
A store credit has been generated for this buyer. To use it, select Store Credit as a type of payment when completing the sale.
OK

- A credit amount will now display in the center of the invoice indicating the unused credit amount.



- Click Continue to proceed through the sale normally and on the Payments screen, the amount of available credit will be indicated at the top of the screen.



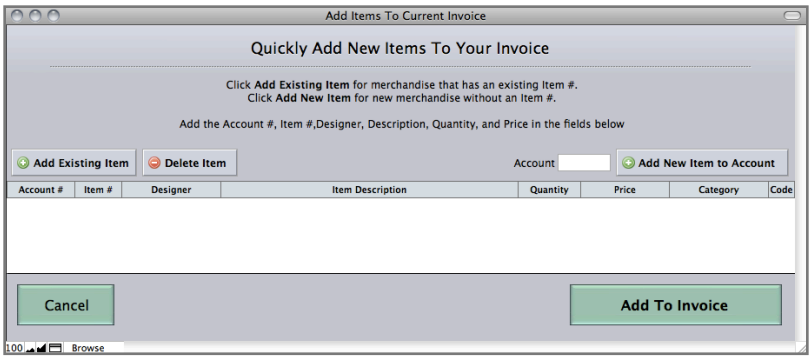
- Click the **Store Credit** payment button on the left to use the specified amount of credit to the purchase. *In the example screenshot above the specified amount is 44.99 so when the user clicks the Store Credit button, 44.99 will be taken out of the customer's 246.00 credit.*

Using Quick Add: Selling Items Before They're Inventoried

While creating and editing a sale, you can add items to your inventory while simultaneously adding the items to your current invoice. This functionality is especially useful for businesses migrating from old inventory systems (paper or other programs) and would like to perform the process gradually for the existing items currently in stock.

- To start, click the **Quick Add** button at the top of the sales screen.

- The Quick Add dialog window will open.



- To add new items, click on the **Add Existing Item** button for as many items as needed. If you added an incorrect item, click on **Delete Item** to remove the record.

To add new items to an existing account and have InBloom use the next available item number, enter the account number in the Account field and click the **Add New Item to Account**.

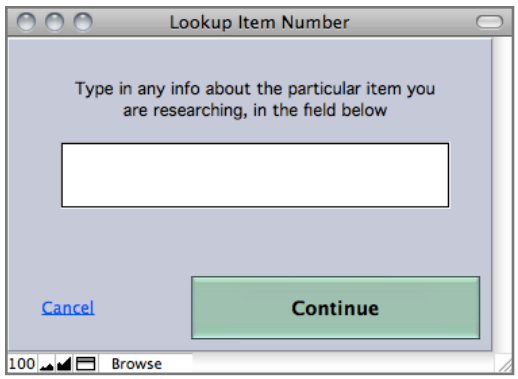
- When you've added all the items you would like to add to the invoice, click the **Add to Invoice** button on the bottom right.

Looking Up Items During A Sale

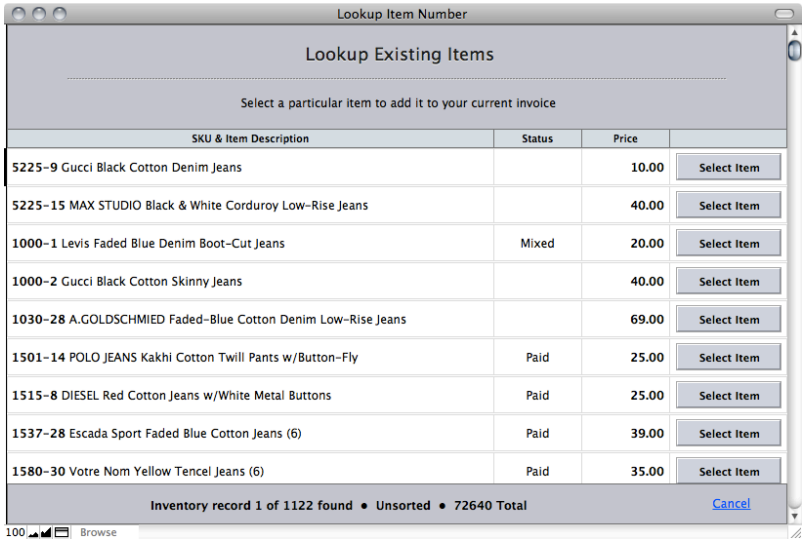
While entering a transaction, you can also add items by keyword if you have lost the price tag and/or SKU.

Lookup Item #

- To begin looking for an item, click the **Item Lookup** button at the top of the sales screen.



- In the dialog box that opens, simply enter any descriptive keywords or account numbers and hit the **Continue** on your keyboard.



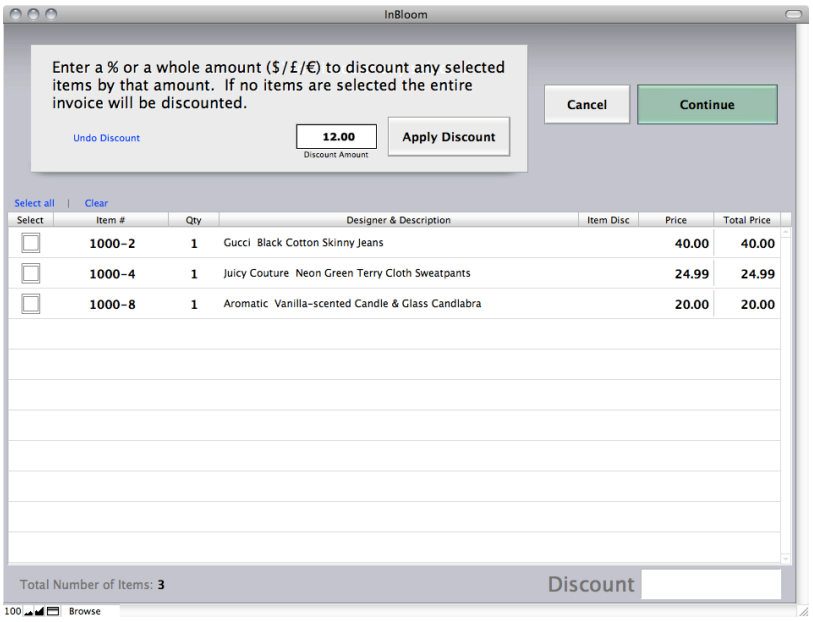
- If InBloom can match any of your keywords, it will display the results in a list that will allow you to pick and choose the item to be added to the current invoice. Click the **Select Item** button on the row of the item you would like to add to the invoice.
- Proceed to complete the invoice as you like.

Discounting Items When Writing A Sale

While creating and editing a sale, you can discount each line item on the invoice manually or using the Discounts tool in the Point of Sale screen.

The Discounts tool lets you modify multiple items at once. You can select multiple rows and reduce by percentages or fixed amounts easily.

- To begin, add items to your sale as you would normally.
- Once you've added all your items, click the **Specify Discounts** button in the toolbar.



- Your invoice will switch to Discount mode.
- Here you can apply discounts in four different ways:
    1. You can apply a discount by amount to the whole invoice.
    2. You can apply a discount by percent to the whole invoice.
    3. You can apply a discount by amount to any selected items.
    4. You can apply a discount by percent to any selected items.
- Apply the discount in your preferred manner and click **Continue**.

When you apply a discount to the whole invoice, it comes out of the store's portion of the sale.

When you apply a discount to selected items, the reduction comes out of the consignor's portion of the sale of the item.

Discounting The Invoice

To discount the entire invoice by a flat amount, enter the value in the Discount Amount field *(e.g. 50.00)* and click the **Apply Discount** button, then click the **Continue** button.

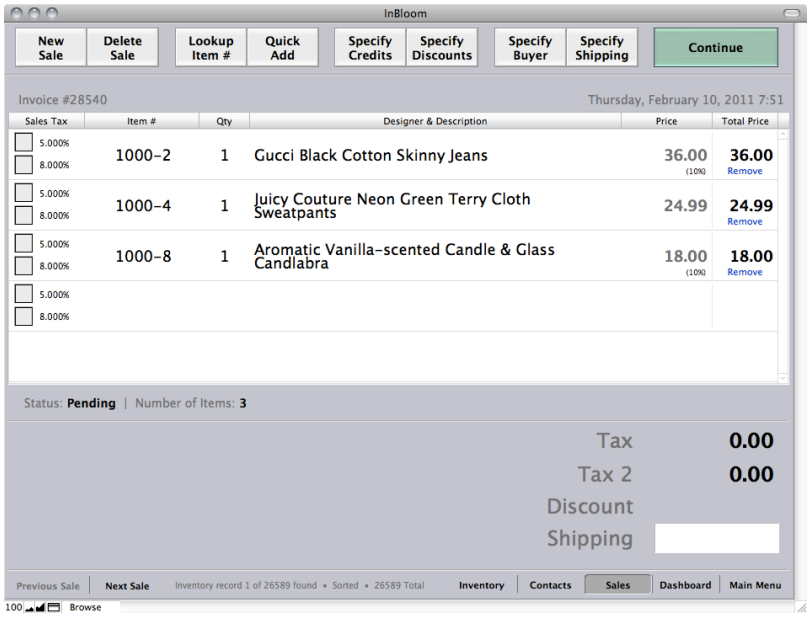
To discount the entire invoice by a percentage, enter the percentage value, including the %, *(e.g. 50%)* in the Discount Amount field and click the **Apply Discount** button, then click the **Continue** button.

Discounting Selected Items

To discount selected items by a flat amount, enter the value in the Discount Amount field *(e.g. 10.00)*, select the items to discount by clicking the checkbox for each item, or clicking the **Select All** link, on the top of the column, and click the **Apply Discount** button. The amount discounted for each invoice item will appear in the Item Discount column , then click the **Continue** button.

To discount selected items by a percentage amount, enter the value in the Discount Amount field *(e.g. 10%)*, select the items to discount by

clicking the checkbox for each item, or clicking the **Select All** link, on the top of the column, and click the **Apply Discount** button. The amount discounted for each invoice item will appear in the Item Discount column , then click the **Continue** button.

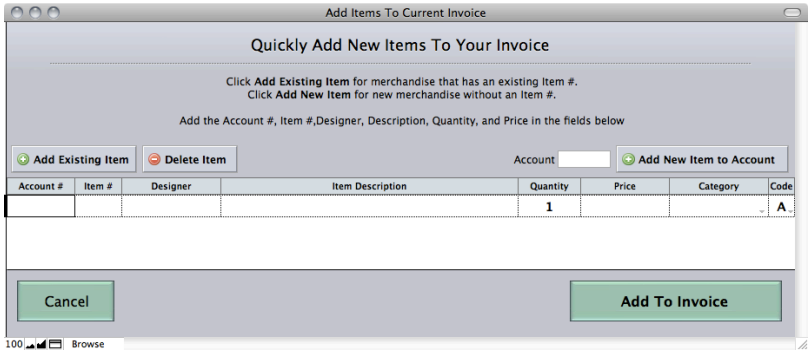


When you return to the invoice screen after applying any discounts, you'll see the discount applied beneath each price for each item.

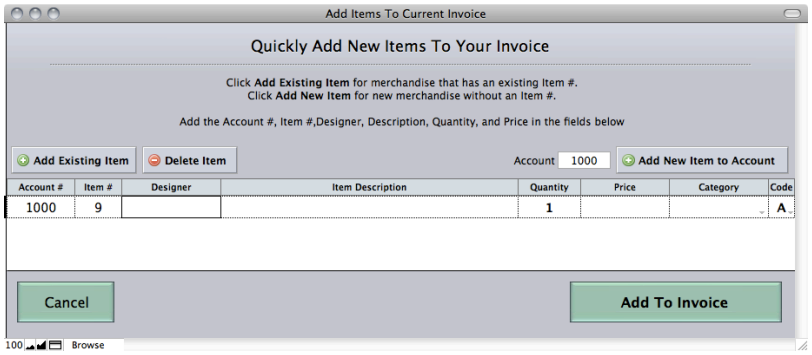
Adding Non-Inventory Items To A Sale

Because you can only sell items in InBloom when they are in your inventory, we've designed a function where you can add items to your inventory while simultaneously adding the items to your current invoice.

- To begin, use the **Quick Add** button on the top of the Point Of Sale screen.



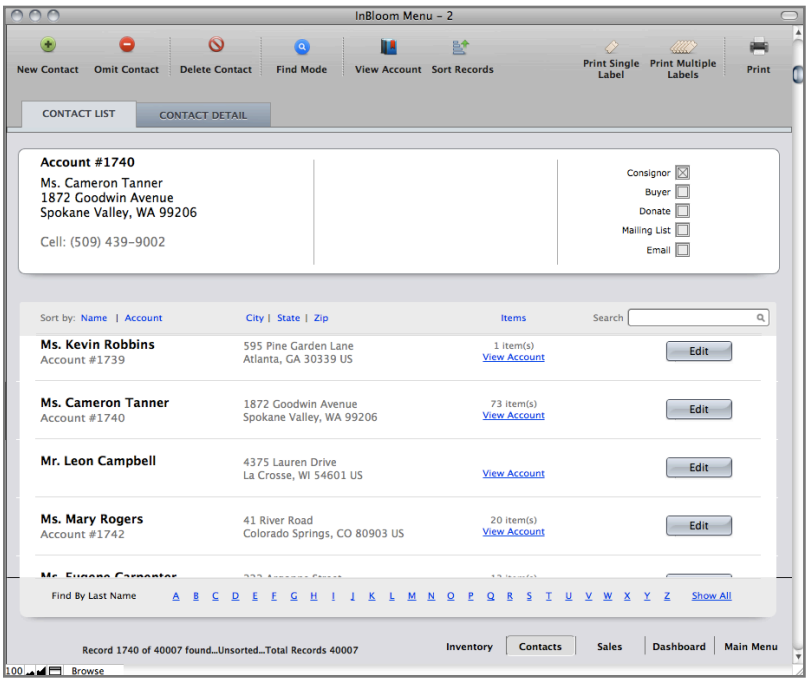
- The Quick Add window will appear.
- If you're migrating from another inventory system and adding items on-the-fly, you can click the **Add Existing Item** button. A new blank inventory record will be created where you can specify an Account Number, Item Number, Designer/Brand, Description, Quantity, Price, Category, and Price Code. You can click the **Add Existing Item** button repeatedly to add multiple rows.



- If you would like to sell an item that hasn't been inventoried yet, but add the item to an existing account, you can enter the consignor's account in the Account field *(e.g. 1000)*, then click the **Add New Items to Account** button to create a new record in that consignor's account. You can click the **Add New Items** button repeatedly to add multiple new items to the same account.
- Click the **Add To Invoice** button to proceed to add all items to the pending sale invoice.

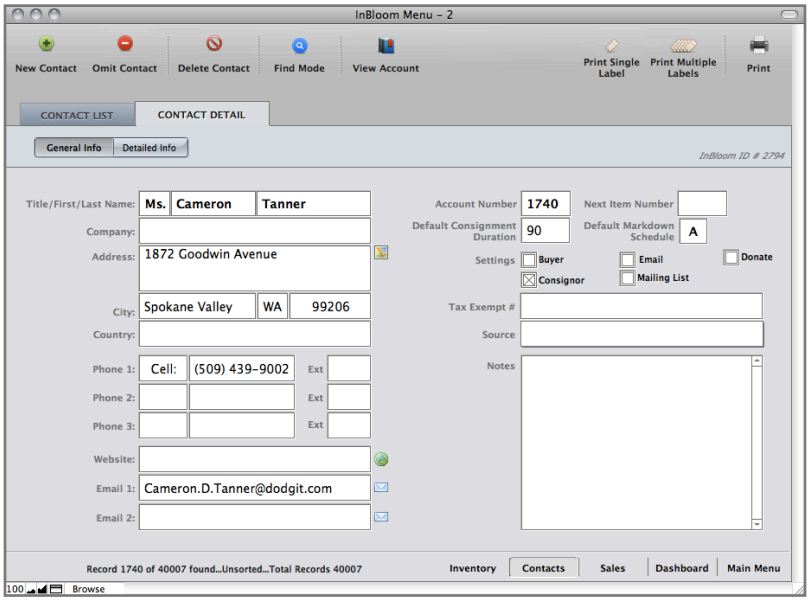
Managing Contacts: Your Buyers & Consignors

One Really Great Address Book



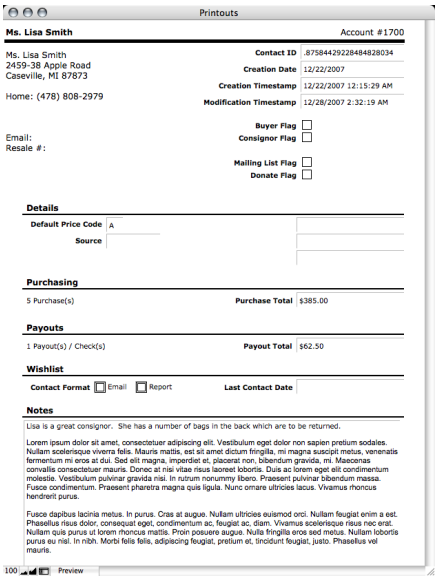
The Contacts database within InBloom is a central address book that stores basic and detailed info about any person or company you do business with. Because most consignment businesses have an overlap of consignors that are buyers, both consignors and buyers are stored in this same database. (Don't worry, you do not have to have two separate records if they are both buyer and consignor. InBloom manages this very easily for you).

You can view the contacts as one long list under the Contact List tab or edit info one contact at a time, by clicking either the **Contact Detail** tab or the **Edit** button to the right of the contact's name in the list.



It's worth noting that this screen is designed to mirror the Consignor Info View you saw earlier when managing Inventory. You can track the exact same information because it's in the exact same database.

In addition the toolbar at the top lets you print a mailing label (using the **Print Single Label** button) for the contact you're viewing or for the set of contact records you're viewing (using the **Print Multiple Labels** button). Clicking the **Print** button will generate a single page consolidated summary of basic consignor info, shown on the right.


Printouts
Ms. Lisa Smith
Account #1700
Ms. Lisa Smith
2459-38 Apple Road
Caseville, MI 87873
Home: (478) 808-2979
Email:
Resale #:
Contact ID .875844292284848828034
Creation Date 12/22/2007
Creation Timestamp 12/22/2007 12:15:29 AM
Modification Timestamp 12/28/2007 2:32:19 AM
Buyer Flag
Consignor Flag
Mailing List Flag
Donate Flag
Details
Default Price Code A
Source
Purchasing
5 Purchase(s)
Purchase Total $385.00
Payouts
1 Payout(s) / Check(s)
Payout Total $62.50
Wishlist
Contact Format Email Report
Last Contact Date
Notes
Lisa is a great consignor. She has a number of bags in the back which are to be returned.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Vestibulum eget dolor non sapien pretium sodales. Nullam scelerisque viverra felis. Mauris mattis, est sit amet dictum fringilla, mi magna suscipit metus, venenatis fermentum mi eros at dui. Sed elit magna, imperdiet et, placerat non, bibendum gravida, mi. Maecenas convallis consectetuer mauris. Donec at nisi vitae risus laoreet lobortis. Duis ac lorem eget elit condimentum molestie. Vestibulum pulvinar gravida nisi. In rutrum nonummy libero. Praesent pulvinar bibendum massa. Fusce condimentum. Praesent pharetra magna quis ligula. Nunc ornare ultricies lacus. Vivamus rhoncus hendrerit purus.
Fusce dapibus lacinia metus. In purus. Cras at augue. Nullam ultricies euismod orci. Nullam feugiat enim a est. Phasellus risus dolor, consequat eget, condimentum ac, feugiat ac, diam. Vivamus scelerisque risus nec erat. Nullam quis purus ut lorem rhoncus mattis. Proin posuere augue. Nulla fringilla eros sed metus. Nullam lobortis purus eu nisl. In nibh. Morbi felis felis, adipiscing feugiat, pretium et, tincidunt feugiat, justo. Phasellus vel mauris.
Preview

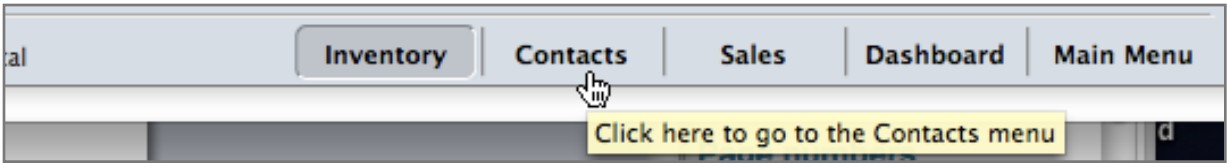
Clicking the Maps icon will open a new browser window and plot this person's address using Google Maps.

Clicking the Web Link icon will open this person's website using your web browser

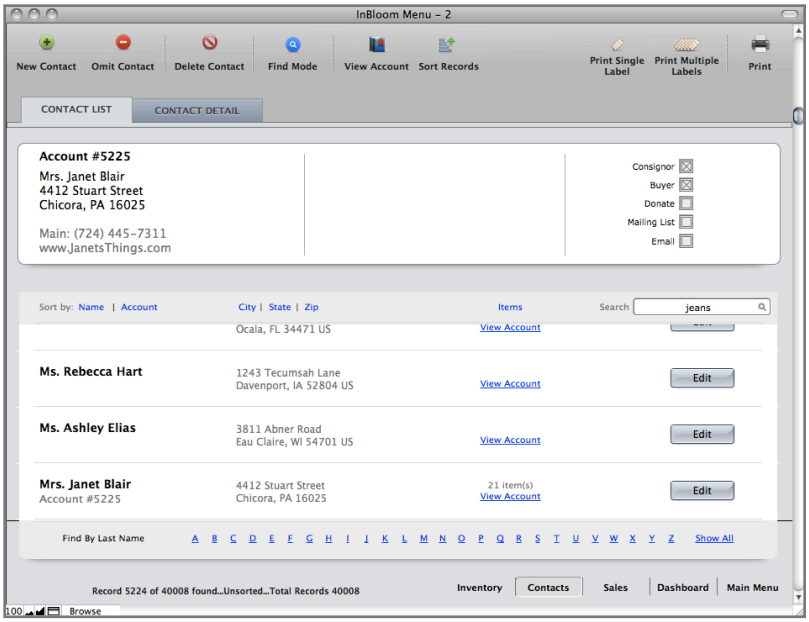
Clicking the Email icon will pre-address an email in your email program to the specified email address.

Browsing & Editing Contacts

You can access your contacts from just about any screen in InBloom.

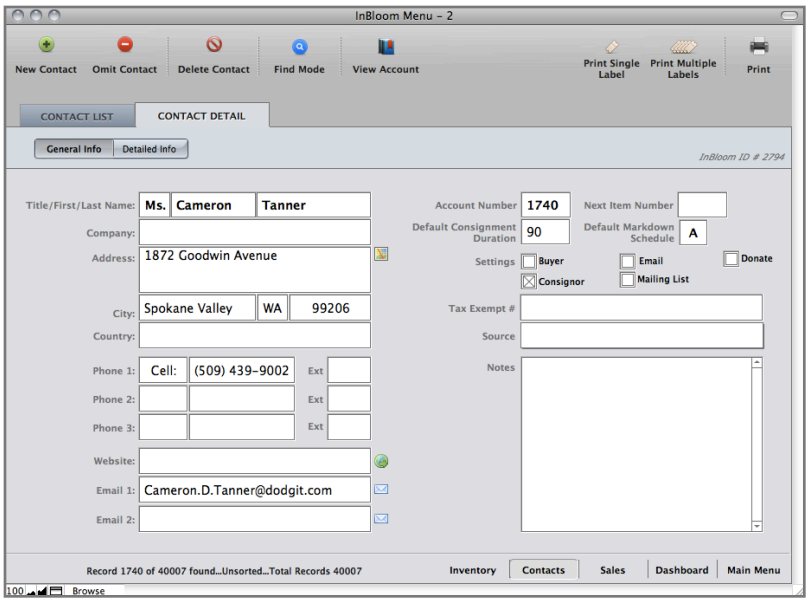


- To begin, click the **Contacts** button in the footer on any screen, or click the **Contacts** button on the Main Menu.



- InBloom will display the full list of contacts including both buyers and consignors.
- This list view gives you simple and easy-to-read access of all of the contacts stored within InBloom. Click any contact to select that record and view a general synopsis of their information on the top panel.
- To edit this contact, you can change any of the basic fields in the field list at the bottom of the list view or you can click on the **Contact Detail** tab at the top or on the **Edit** button.

Managing Your Contact Information



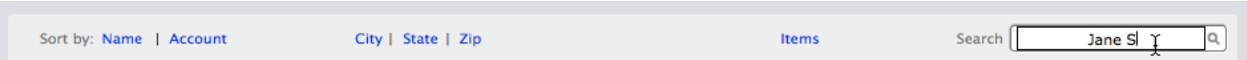
There are several fields on the Contact Detail and Consignor Info screen which are worth noting, the table below explains the purpose of each piece of data:

Field	Function
Account Number	This number links all items with a matching account number in the Inventory to the current contact
Name, Address, City, State, Zip, Country	General info fields that appear on anywhere contact information is displayed such as contracts, Consignment screens, sales receipts, etc. Note that clicking the adjoining map icon will map the address using Google Maps™ in your web browser.
Phone #1, 2, 3	Allows three separate entries for important contact phone numbers. These numbers can be labeled as home, work, fax, etc using the pulldown menu.
Email #1, 2	Allows two separate entries for important contact email addresses. Note that clicking the adjoining envelope icon will create a new email addressed to this email address in your default email program.

Field	Function
Buyer Checkbox	Flags this contact as a buyer
Consignor Checkbox	Flags this contact as a consignor
Donate Checkbox	Flags this contact as a consignor that allows/wants donations
Mailing List Checkbox	Flags this contact as a mailing list participant
Email Checkbox	Flags this contact as an email list participant
Default Markdown Schedule	This markdown code will automatically prefill into any items entered into this consignor's account
Default Consignment Duration	This consignment duration will automatically prefill into any items entered into this consignor's account
Tax Exempt Number	Keeps track of a tax exempt number for this contact
Source	Keeps track of where a contact learned about your business
Notes	Keeps track of any private notes you would like to keep track of

How To Find Contacts

You can search for any contact in your system, in two ways.

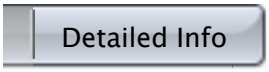


1. First, you can use the QuickSearch field to enter any name or address info. Simply enter the search criteria and hit the Enter key on your keyboard or click anywhere outside of the field *e.g. searching for Jane S in the image above.*

   As soon as you hit Enter, InBloom will perform the search and show any matching results.

2. Or, you can use Find Mode to specify the exact search criteria. Find Mode is covered in depth in the Find Mode chapter.

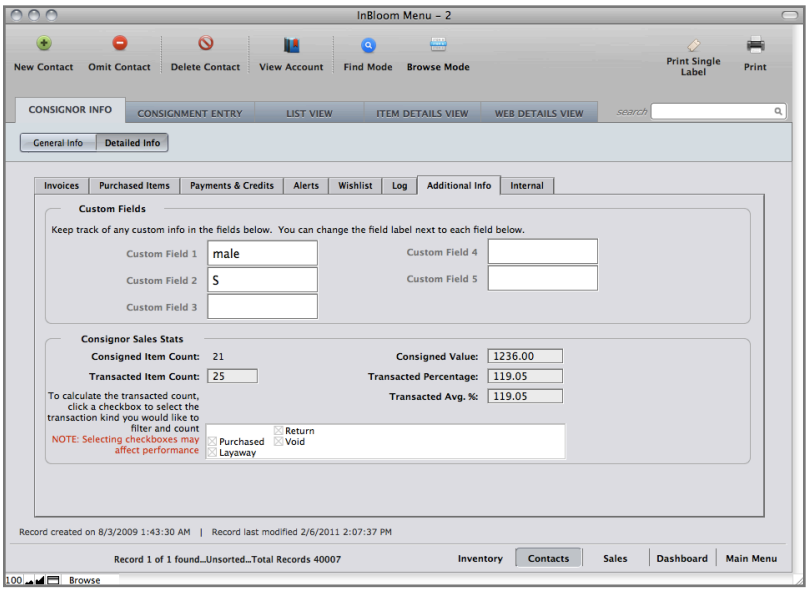
Digging Deeper Into Your Contacts



The **Detailed Info** button, just under the tab switches the screen to display deeper views of related data.
Here you can see invoices linked to this consignor, items purchased, past payments & store credits, items on the contact's wishlist, and any popup alerts to display when viewing this person's inventory.

The Additional Info Tab

The **Additional Info** tab displays the 5 custom fields with custom labels in addition to sell-thru and total value information for the Consignor. You can change the field labels by clicking on the label text.

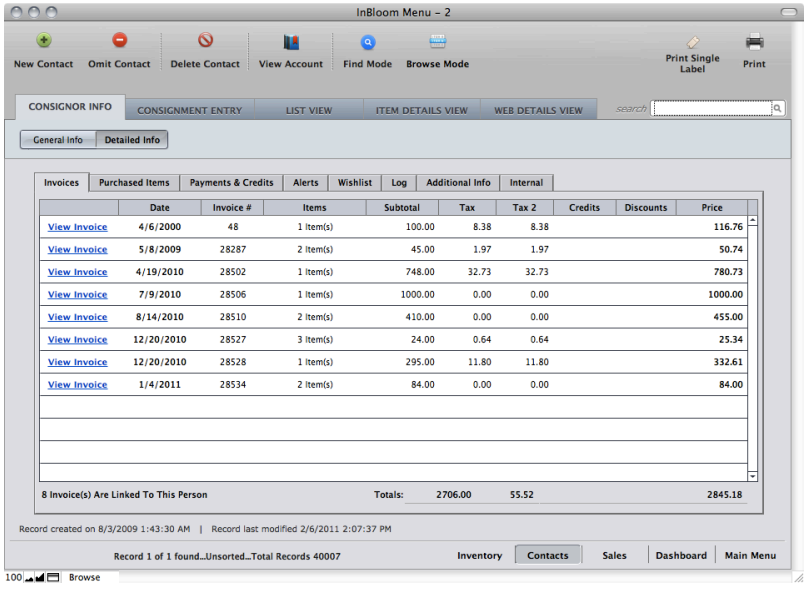


You can also filter for a total # of various kinds of transactions by choosing from the appropriate checkbox on the bottom left. The

Transacted Percentage is also commonly called the Sell-Thru percentage which indicates the # of items a Consignor has sold, while the Transacted Average Percentage is a percentage for all of the Consignors in the found set. This value is useful only when you view multiple or all Consignor records at once as this field calculates the average of the Transacted Percentage across all records.

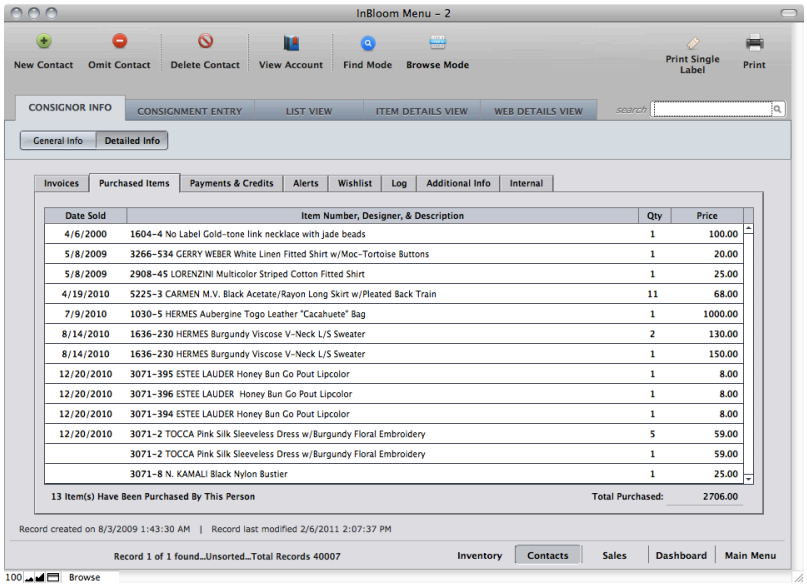
The Invoices Tab

The **Invoices** tab displays all invoices where the contact was specified as a buyer. The total value of all sales is shown at the bottom of the screen. A View Invoice link lets you open the selected invoice in a single click.



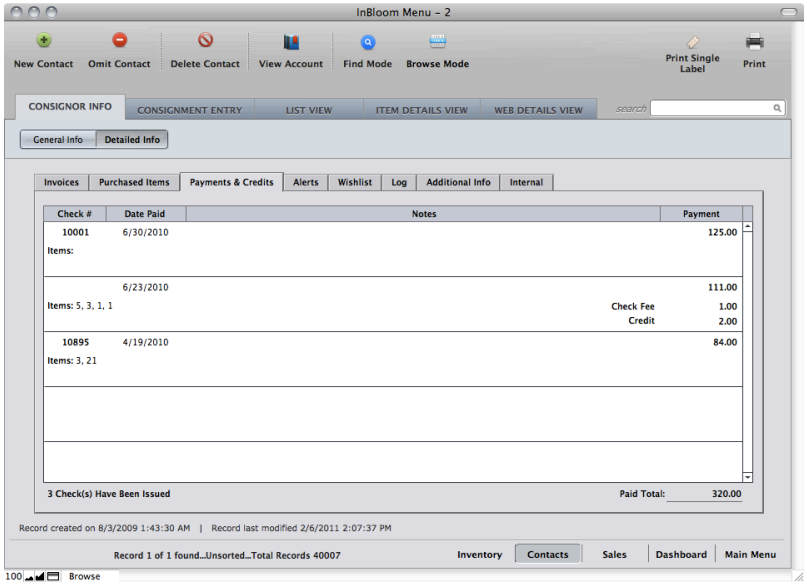
The Purchased Items Tab

The **Purchased Items** tab displays all the items transacted on sales invoices where this contact was specified as a buyer. The total value of all sales for this customer shown at the bottom of the screen.

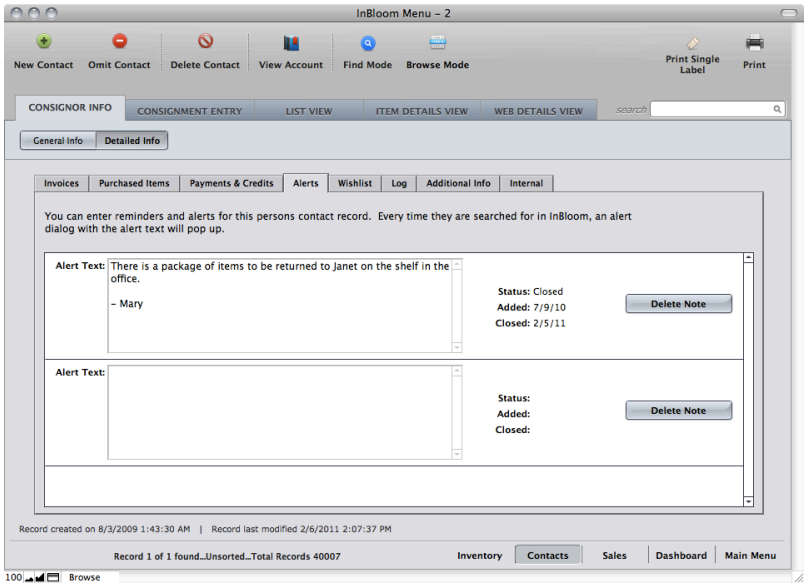

InBloom Menu – 2
New Contact
Omit Contact
Delete Contact
View Account
Find Mode
Browse Mode
Print Single Label
Print
CONSIGNOR INFO
CONSIGNMENT ENTRY
LIST VIEW
ITEM DETAILS VIEW
WEB DETAILS VIEW
General Info
Detailed Info
Invoices
Purchased Items
Payments & Credits
Alerts
Wishlist
Log
Additional Info
Internal
Date Sold
Item Number, Designer, & Description
Qty
Price
4/6/2000 1604-4 No Label Gold-tone link necklace with jade beads 1 100.00
5/8/2009 3266-534 GERRY WEBER White Linen Fitted Shirt w/Moc-Tortoise Buttons 1 20.00
5/8/2009 2908-45 LORENZINI Multicolor Striped Cotton Fitted Shirt 1 25.00
4/19/2010 5225-3 CARMEN M.V. Black Acetate/Rayon Long Skirt w/Pleated Back Train 11 68.00
7/9/2010 1030-5 HERMES Aubergine Togo Leather "Cacahuete" Bag 1 1000.00
8/14/2010 1636-230 HERMES Burgundy Viscose V-Neck L/S Sweater 2 130.00
8/14/2010 1636-230 HERMES Burgundy Viscose V-Neck L/S Sweater 1 150.00
12/20/2010 3071-395 ESTEE LAUDER Honey Bun Go Pout Lipcolor 1 8.00
12/20/2010 3071-396 ESTEE LAUDER Honey Bun Go Pout Lipcolor 1 8.00
12/20/2010 3071-394 ESTEE LAUDER Honey Bun Go Pout Lipcolor 1 8.00
12/20/2010 3071-2 TOCCA Pink Silk Sleeveless Dress w/Burgundy Floral Embroidery 5 59.00
3071-2 TOCCA Pink Silk Sleeveless Dress w/Burgundy Floral Embroidery 1 59.00
3071-8 N. KAMALI Black Nylon Bustier 1 25.00
13 Item(s) Have Been Purchased By This Person
Total Purchased: 2706.00
Record created on 8/3/2009 1:43:30 AM | Record last modified 2/6/2011 2:07:37 PM
Record 1 of 1 found...Unsorted...Total Records 40007
Inventory
Contacts
Sales
Dashboard
Main Menu
Browse

The Payments & Credits Tab

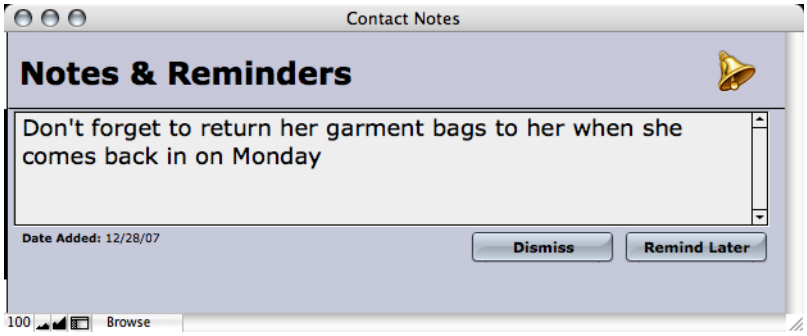
The **Payments** tab displays all hand-written checks, InBloom-generated checks, and store credits for this contact. There is also a Notes field where you can add any info relating to a payment. The information in the Notes field is not printed anywhere and is only displayed within InBloom.



The Alerts Tab



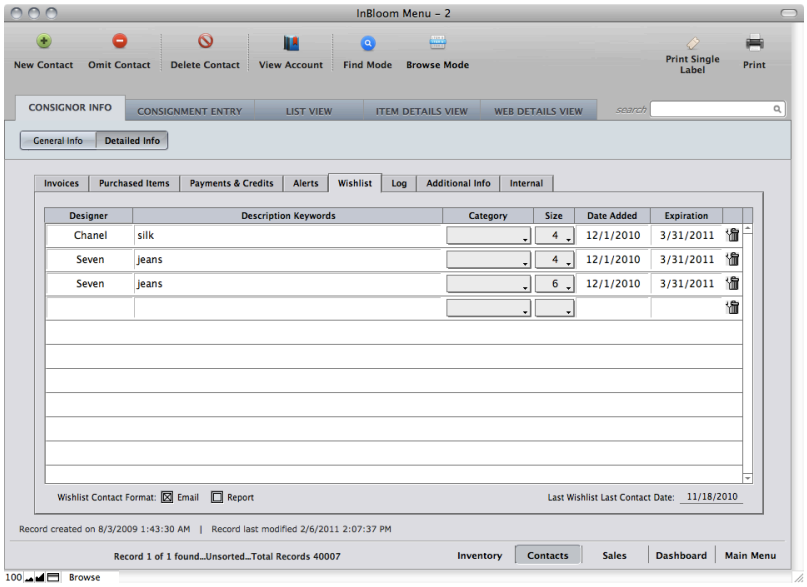
The **Alerts** tab displays the list of active messages that can open when you view a consignor's account, as well as the previously dismissed alerts. Alerts are little popup windows that display reminders. You can enter text that will be displayed anytime a contact is specified as a buyer in a transaction, or if their consignment account is searched for.



The alert text will be displayed in a dialog above the current window. You can choose to permanently dismiss the dialog or to have InBloom remind you again later.

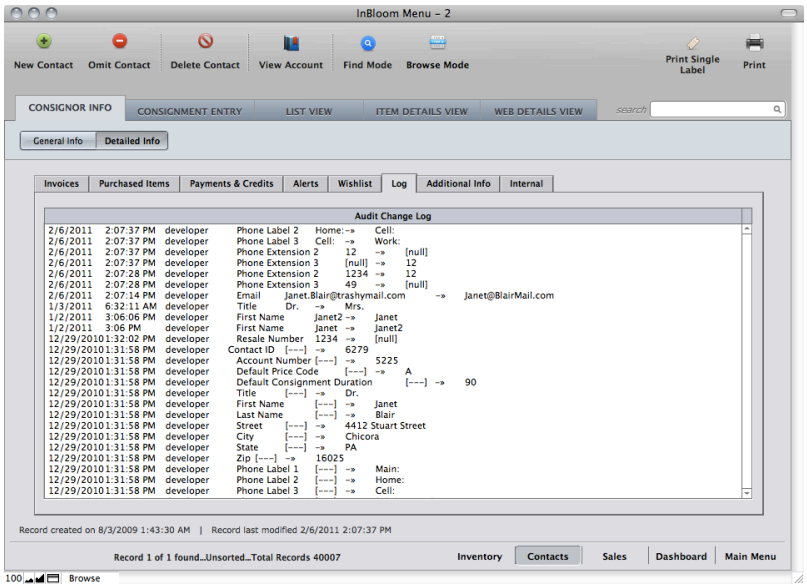
The Wishlist Tab

The **Wishlist** tab displays all wishlist criteria for the contact. When you run the Wishlist report, InBloom will generate a consolidated report of any matches to the criteria set here. See the section on Creating Customer Wishlists.



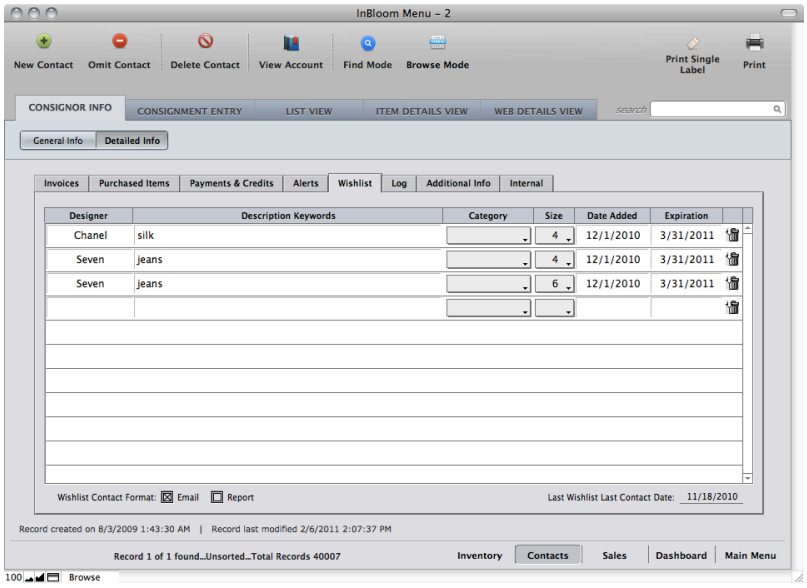
The Log Tab

The **Log** tab displays the audit log that is maintained for any changes made to the contact's information. InBloom can precisely detail which user made which changes and when to a particular record. This is especially useful for undoing accidental changes to fields.


InBloom Menu – 2
New Contact
Omit Contact
Delete Contact
View Account
Find Mode
Browse Mode
Print Single Label
Print
CONSIGNOR INFO
CONSIGNMENT ENTRY
LIST VIEW
ITEM DETAILS VIEW
WEB DETAILS VIEW
General Info
Detailed Info
Invoices
Purchased Items
Payments & Credits
Alerts
Wishlist
Log
Additional Info
Internal
Audit Change Log
2/6/2011 2:07:37 PM developer Phone Label 2 Home:-» Cell:
2/6/2011 2:07:37 PM developer Phone Label 3 Cell: -» Work:
2/6/2011 2:07:37 PM developer Phone Extension 2 12 -» [null]
2/6/2011 2:07:37 PM developer Phone Extension 3 [null] -» 12
2/6/2011 2:07:28 PM developer Phone Extension 2 1234 -» 12
2/6/2011 2:07:28 PM developer Phone Extension 3 49 -» [null]
2/6/2011 2:07:14 PM developer Email Janet.Blair@trashymail.com -» Janet@BlairMail.com
1/3/2011 6:32:11 AM developer Title Dr. -» Mrs.
1/2/2011 3:06:06 PM developer First Name Janet2 -» Janet
1/2/2011 3:06 PM developer First Name Janet -» Janet2
12/29/2010 1:32:02 PM developer Resale Number 1234 -» [null]
12/29/2010 1:31:58 PM developer Contact ID [---] -» 6279
12/29/2010 1:31:58 PM developer Account Number [---] -» 5225
12/29/2010 1:31:58 PM developer Default Price Code [---] -» A
12/29/2010 1:31:58 PM developer Default Consignment Duration [---] -» 90
12/29/2010 1:31:58 PM developer Title [---] -» Dr.
12/29/2010 1:31:58 PM developer First Name [---] -» Janet
12/29/2010 1:31:58 PM developer Last Name [---] -» Blair
12/29/2010 1:31:58 PM developer Street [---] -» 4412 Stuart Street
12/29/2010 1:31:58 PM developer City [---] -» Chicora
12/29/2010 1:31:58 PM developer State [---] -» PA
12/29/2010 1:31:58 PM developer Zip [---] -» 16025
12/29/2010 1:31:58 PM developer Phone Label 1 [---] -» Main:
12/29/2010 1:31:58 PM developer Phone Label 2 [---] -» Home:
12/29/2010 1:31:58 PM developer Phone Label 3 [---] -» Cell:
Record created on 8/3/2009 1:43:30 AM | Record last modified 2/6/2011 2:07:37 PM
Record 1 of 1 found...Unsorted...Total Records 40007
Inventory
Contacts
Sales
Dashboard
Main Menu
Browse

Creating Customer Wishlists

InBloom can maintain wishlists for your customers and search for the wishlist criteria in your available inventory.



To add new criteria:

- Access the Wishlist tab for the contact
- Click on the empty row and enter the literal search terms. You can compound criteria by adding them to the same wishlist row *e.g. if you want to search for Gucci black jeans in size 6, enter **Gucci** as the Designer, enter **black jeans** as the Description keywords, and add **6** to the Size menu.*

Note that wishlist items are automatically set to expire within 90 days. If you want to remove this expiration, simply delete the date from the Expiration field.

Finding Customer Wishlist Matches

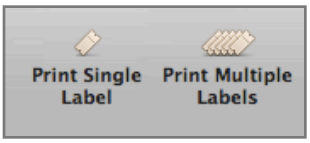
To find inventory that matches customer wishlists, simply run the Wishlist report in the Reports module:

- From the **Main Menu**, click **Other Modules**

- Click **Reports**
- Click the report named **Buyer Wishlists**
- Click **Run Report**

This functionality is further explained in the Reports chapter.

Printing Mailing Labels



InBloom gives you quick access to printing mailing labels from the Contacts and Consignor Info screens. If you use a Dymo label printer to print adhesive labels and adhere them to tags, these buttons give you quick access to printing a single mailing label or a strip of many labels. Simply select the contact whose address you would like to print, and choose **Print Single Label**. InBloom will switch to your label printer and print the label.

Ms. Janet Smith
4811 Jody Road
Paoli, PA 19301

The **Print Multiple Labels** button sends all the contacts you are looking at to the label printer. This is useful for small batches (less than 100) of mailing labels.

For bulk printing of mailing labels, like for a mailer for a sale, use the **Mailing Labels** report which prints to sheets of labels, further discussed in the Reports chapter.

Reports

Browsing & Running Reports

InBloom comes with multiple pre-built reports that are used to both summarize information as well as extend InBloom functionality. This includes printouts such as all items reduced (Markdown Report), printing sheets of mailing labels (Mailing Labels), finding inventory matches against buyer wishlists, and more.

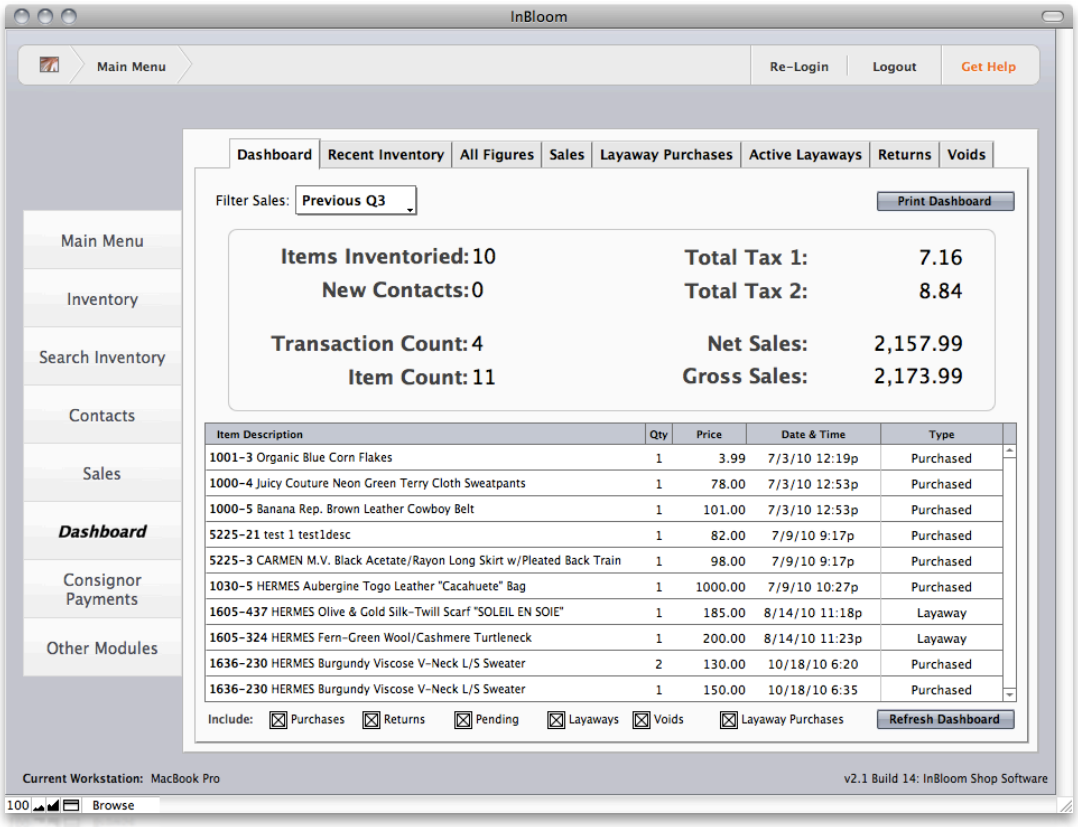
- To use the InBloom Reports, from the Main Menu, click **Other Modules**.
- Next, click the **Reports** button.
- The Reports screen will appear with a selection of different reports to run. Click on the report you'd like to run.
- On the report setup screen, enter any specifics necessary to perform the report, then click the **Run Report** button.

A Description Of Each InBloom Report

Report Name	Description
Markdown Report	Prints a list of all items to be reduced. **This reports also extends the Price Code and Mark Down Schedule functionality and triggers the current price of available inventory to be reduced. Price reductions do not occur in inventory unless you run this report.**
Unsold Inventory	Performs a search for all available inventory
Count Sheet	Prints a list of all item quantities. This is typically used in standard retail environments to ensure all inventory is accounted for.
Carried Credits	Search for and print any pending store credits that were generated with InBloom but have not been fully used.
Sales Tax	Print the total amount of sales tax collected for a given period and the total value of sales shipped for that period.
Buyer & Consignor List	Prints summarized contact lists for Buyers and/or Consignors.
Buyer Wishlists	This report will search for any inventory items that match customer wishlists.
Mailing Labels	Print sheets of mailing labels for any contacts matching various criteria.
Email Contacts	Use this report to generate a single email message in your default email program that is automatically addressed to all of your contacts.
Category Report	Print a summary of sales for each inventory category.
End Of Day	Prints totals for various payment types, tax collected, and more.
Daily Totals	Prints a list of each transaction for a given time period.
Payment Totals	Prints a list of all payments accepted for a given time period.
Employee Sales	Prints a summarized report of all sales by salesperson name.

The InBloom Dashboard

Using The InBloom Dashboard


InBloom
Main Menu
Re-Login
Logout
Get Help
Dashboard
Recent Inventory
All Figures
Sales
Layaway Purchases
Active Layaways
Returns
Voids
Filter Sales: Previous Q3
Print Dashboard
Main Menu
Inventory
Search Inventory
Contacts
Sales
Dashboard
Consignor Payments
Other Modules
Items Inventoried: 10
New Contacts: 0
Transaction Count: 4
Item Count: 11
Total Tax 1: 7.16
Total Tax 2: 8.84
Net Sales: 2,157.99
Gross Sales: 2,173.99
Item Description | Qty | Price | Date & Time | Type
1001-3 Organic Blue Corn Flakes | 1 | 3.99 | 7/3/10 12:19p | Purchased
1000-4 Juicy Couture Neon Green Terry Cloth Sweatpants | 1 | 78.00 | 7/3/10 12:53p | Purchased
1000-5 Banana Rep. Brown Leather Cowboy Belt | 1 | 101.00 | 7/3/10 12:53p | Purchased
5225-21 test 1 test1desc | 1 | 82.00 | 7/9/10 9:17p | Purchased
5225-3 CARMEN M.V. Black Acetate/Rayon Long Skirt w/Pleated Back Train | 1 | 98.00 | 7/9/10 9:17p | Purchased
1030-5 HERMES Aubergine Togo Leather "Cacahuete" Bag | 1 | 1000.00 | 7/9/10 10:27p | Purchased
1605-437 HERMES Olive & Gold Silk-Twill Scarf "SOLEIL EN SOIE" | 1 | 185.00 | 8/14/10 11:18p | Layaway
1605-324 HERMES Fern-Green Wool/Cashmere Turtleneck | 1 | 200.00 | 8/14/10 11:23p | Layaway
1636-230 HERMES Burgundy Viscose V-Neck L/S Sweater | 2 | 130.00 | 10/18/10 6:20 | Purchased
1636-230 HERMES Burgundy Viscose V-Neck L/S Sweater | 1 | 150.00 | 10/18/10 6:35 | Purchased
Include: Purchases Returns Pending Layaways Voids Layaway Purchases
Refresh Dashboard
Current Workstation: MacBook Pro
v2.1 Build 14: InBloom Shop Software
100
Browse

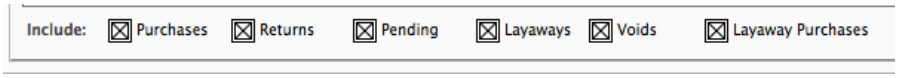
The Dashboard screen is designed to give you easy, one-click access to the basic numbers about your business. Because this can be highly sensitive information, it is also limited to certain groups of users based on your preferences in the Security tab of the InBloom Settings. The Dashboard is easily accessible by clicking the **Dashboard** button on the Main Menu or in the footer of most screens.

InBloom will quickly summarize all transactions for the current day based on your settings. You can filter different time periods by choosing from the Filter Sales pulldown menu. The menu offers several pre-configured options such as the current day, current week,

current month, previous day, previous week, previous month, financial quarters Q1 thru Q4 of the current year and previous year, individual months, and a custom date range option.

The basic figures displayed related to the filter time period as well as the transaction type. The figures are the number of inventory items created, the number of new contacts created, the total amount of Tax 1 and Tax 2 collected, the total number of transactions, the total number of items transacted, the net sales, and the gross sales.

Filtering The Dashboard By Transaction Type



In addition, you can also filter by transaction type and include purchases, pending sales, completed layaways, returns, and voids in summary amounts and counts based on selected checkboxes at the bottom of the window.

The Different Views Of The Dashboard

Additional tabs at the top of the screen provide further views that specify financial figures for the time period selected. These different views are explained in the following table.

Dashboard View	Description
Recent Inventory	Displays a list of all inventory items created in the selected time period.
All Figures	Displays totals for the various transaction types separated by days.
Sales	Displays the counts and financial totals for all normal sales transactions.

Dashboard View	Description
Layaway Purchases	Displays the counts and financial totals for all completed layaway transactions.
Active Layaways	Displays the counts and financial totals for all pending layaway transactions.
Returns	Displays the counts and financial totals for all returns transactions.
Voids	Displays the counts and financial totals for all voided transactions.

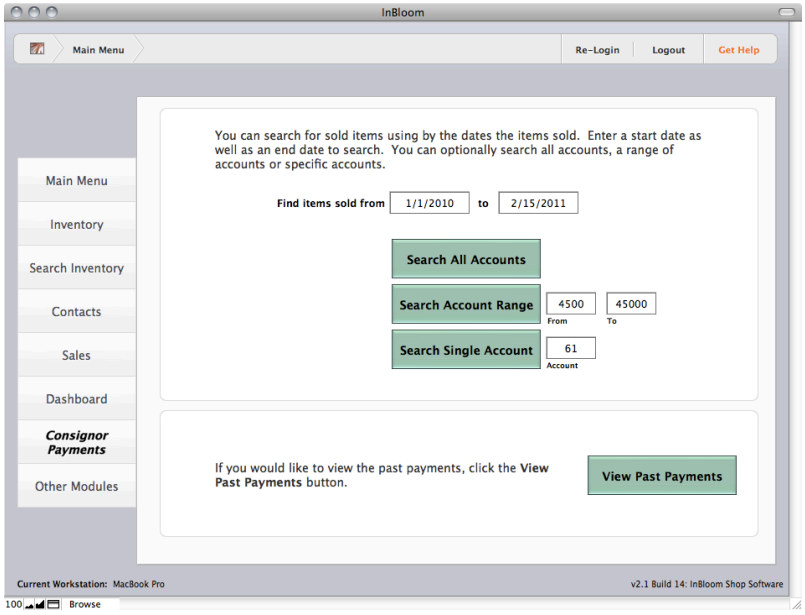
Payments

How To Pay Consignors

You can search for all sold and unpaid items using the Consignor Payments functionality. You can note payments to consignors as either Cash, Store Credit, Handwritten Check, or InBloom-printed Check. Regardless of the method you choose, you can manage the payments precisely. The basics are outlined in the five-step process below.

Step 1: Click Consignor Payments

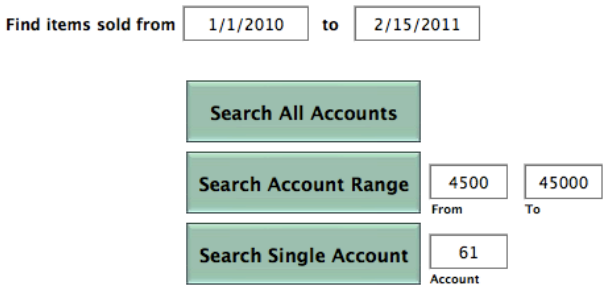
To begin the Payments workflow, simply start at the Main Menu, then click the **Consignor Payments** button.


InBloom
Main Menu
Re-Login
Logout
Get Help
Main Menu
Inventory
Search Inventory
Contacts
Sales
Dashboard
Consignor Payments
Other Modules
You can search for sold items using by the dates the items sold. Enter a start date as well as an end date to search. You can optionally search all accounts, a range of accounts or specific accounts.
Find items sold from 1/1/2010 to 2/15/2011
Search All Accounts
Search Account Range 4500 From 45000 To
Search Single Account 61 Account
If you would like to view the past payments, click the View Past Payments button.
View Past Payments
Current Workstation: MacBook Pro
v2.1 Build 14: InBloom Shop Software
Browse

If you can not access the Consignor Payments screen, re-login with a username and password that has Manage Payment access in the Security tab of the InBloom Settings.

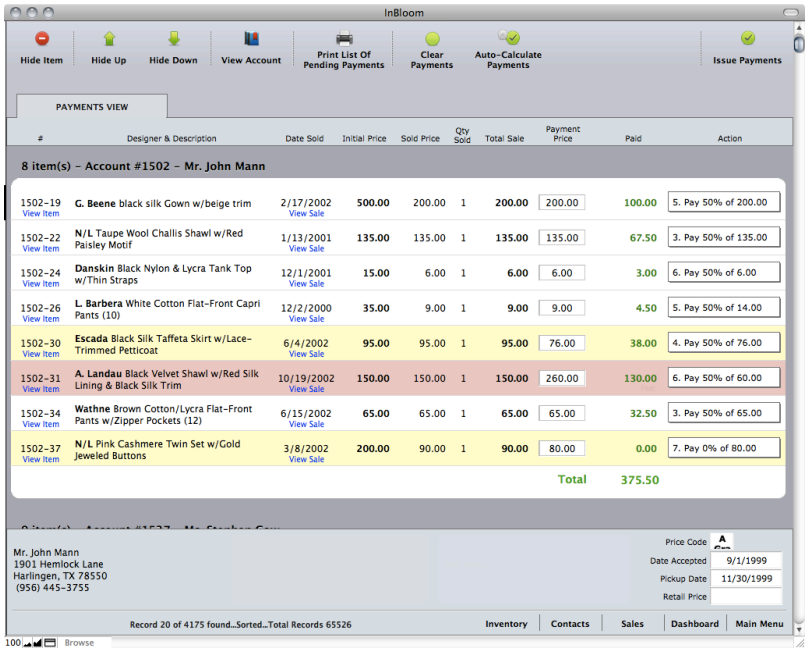
Step 2: Perform The Search

Enter a date range for the sold items in the top two fields. For example, if you were searching for all sales that occurred in May 2010, your date range would be 5/1/2010 to 5/31/2010.



Next, you can search for sold items in all accounts, in a specified account range, or a single account.

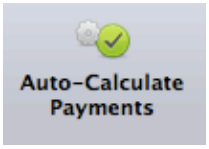
- To search through every accounts, click **Search All Accounts**.
- To search a range of accounts, enter the starting and ending account numbers in the respective From and To fields, then click the **Search Account Range** button.
- To search a single account, enter the account you would like to search in the Account field, then click the **Search Single Account** button.



InBloom will then display any items sold in the specified date range, on the Payments Screen. On this screen, you can review all of the items that are noted as sold and unpaid.

Step 3: Auto-Calculate Consignor Payments

InBloom calculates the amount due to the consignor when you click the **Auto-Calculate Payments** button in the toolbar. The amount to pay for each item appears in **green** on the right of each line.

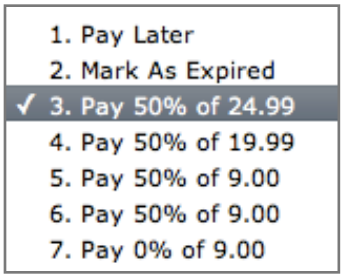


Step 4: Scan Through Pending Payments

Make sure there are no errors in the payment calculation by looking through the list of items to be paid. As a quick visual note:

Items highlighted in yellow are where the item is paying below the sold price. This is designed to catch any entry errors when the item was sold.

Items highlighted in red are where the item is paying above the sold price and you are effectively overpaying the consignor.

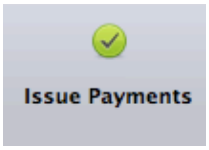


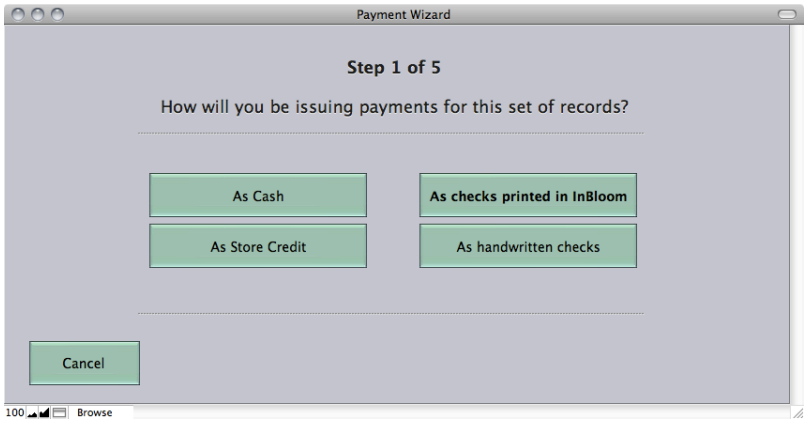
You can make any corrections to the Paid Amount based on the Payment Selection menu at the right of each item, which offers the payment options to according to the Price Code of the item. You can delay payment of the item until the next time requested (Pay Later), absorbing the sale of the item (Mark As Expired), or pay according to the price break down via the item's Price Code.

You can read more about managing and modifying payments in the Modifying Consignor Payments section of this chapter.

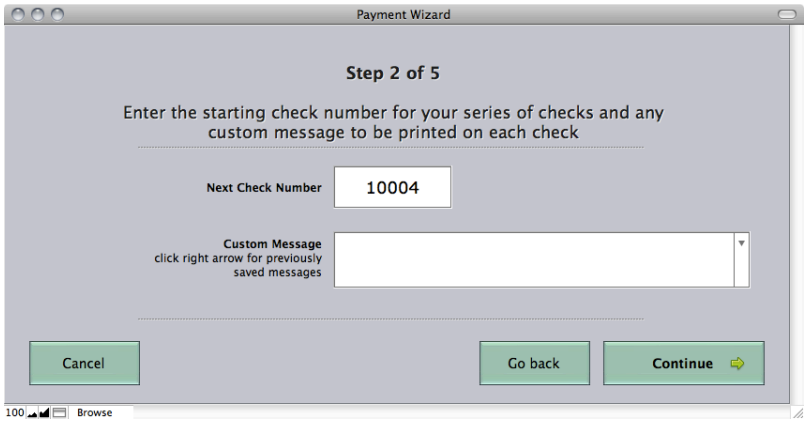
Step 5: Issue The Payments

Now that you've finalized all the payments to be issued, click the **Issue Payments** button on the top of the toolbar to begin walking through the Payment Wizard.

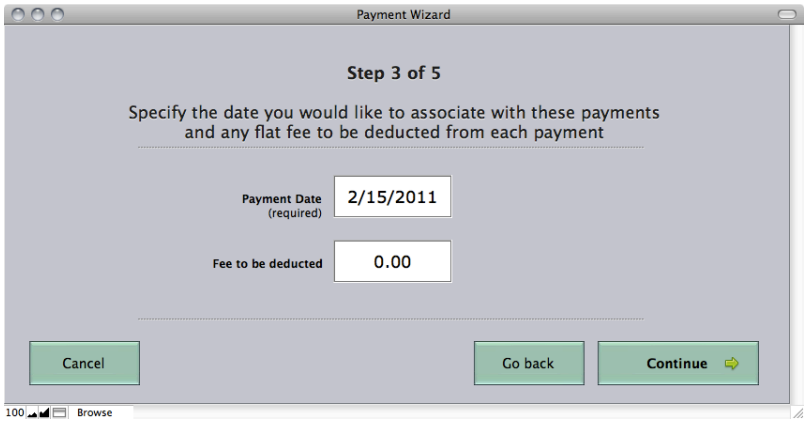




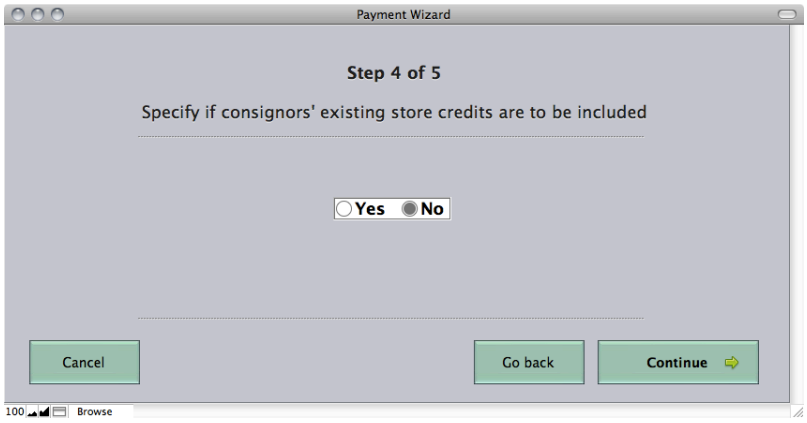
The Payment Wizard walks through the small steps of specifying the type of payment you are issuing.



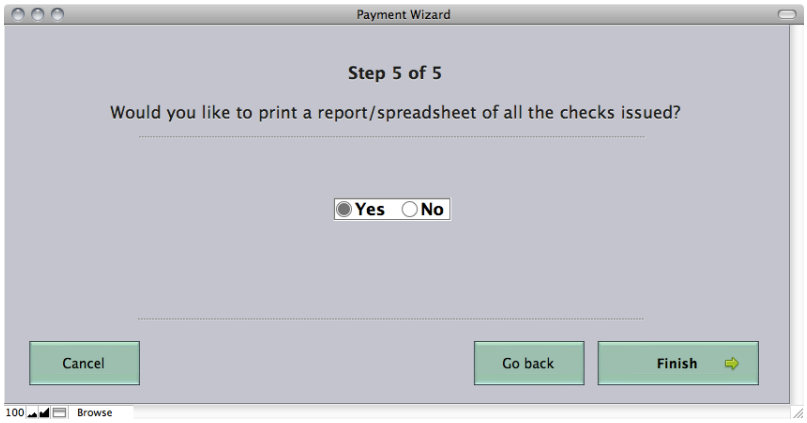
You can specify the starting check number if paying by check and even a custom message that can print on the voucher of any InBloom-printed checks e.g. “We are pleased to include a check for items sold from 5/1/2010 to 5/31/2010”



Regardless of the payment type, you can specify the date you are paying the consignors, which also appears on printed checks, and any fees to be deducted from the consignor payments.



You can also specify whether to include any previously issued store credits in the consignor payments. This is especially useful when issuing checks.



Last but not least, you can also print a spreadsheet after all of the payments have been generated.

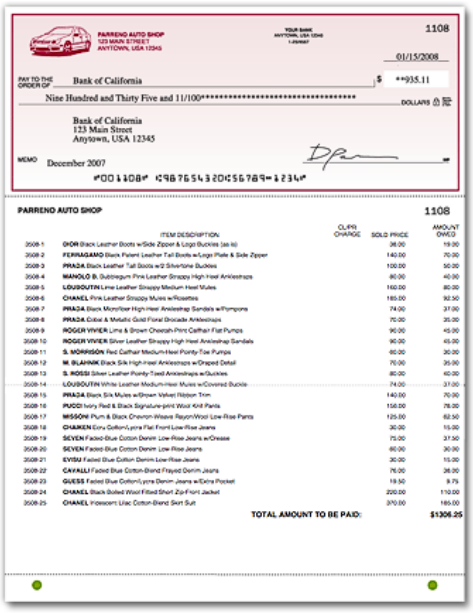
As soon as you have completed all steps in the Payment Wizard window screen, **be sure to insert check paper into your current document printer if you are printing checks.** Click the **Finish** button to proceed with generating your payments. InBloom will create print requests for each check to be printed, display a confirmation dialog to let you know when the payment routine is complete, and then return you to the Main Menu.

Printing Checks In InBloom

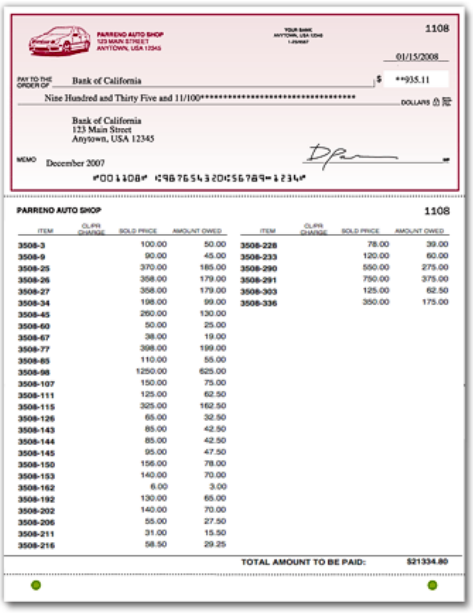
In place of handwriting checks, InBloom can generate printed checks for you and save you at least 50% of the time reserved for preparing payments. Checks can be printed using a laser or inkjet printer.

InBloom is designed to work out-of-the-box with voucher-style checks which feature a pre-printed check on the top third of the page, with a long single voucher on the remainder of the check page. Pre-printed

checks usually have your company name & address, bank routing number, bank account number, and a signature line already printed by the check provider. Check style #DLT104 from Nebs.com is an inexpensive multipurpose check. Other Quicken, QuickBooks, and Money style checks are also compatible but may require tweaking the alignment in Layout Mode in FileMaker.



Long Voucher Style Check



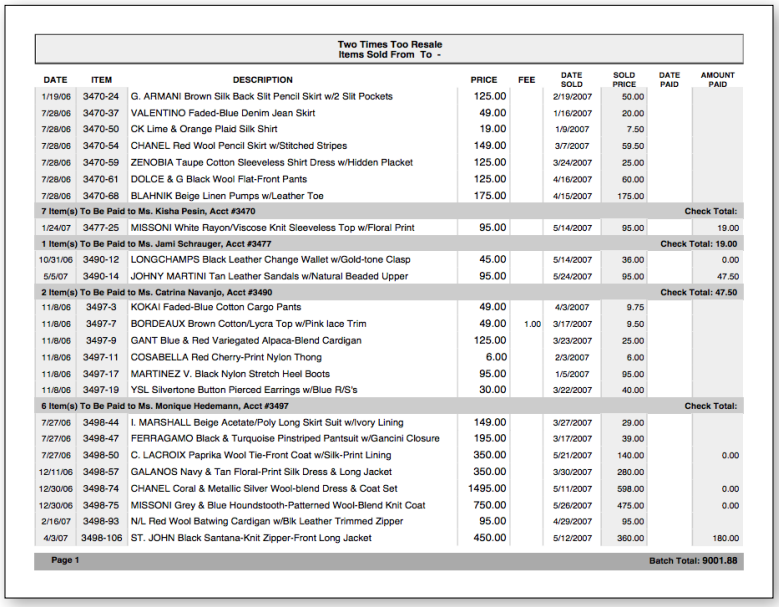
Condensed Voucher Style

There are two templates for voucher check printouts included with InBloom. The first style is the *Long Voucher Style Check* which is designed to handle payments for up to 32 inventory items on a single check printout. The second style is the *Condensed Voucher Style* check which is a smaller multi-column layout that can display up to 55 items but does not include the Designer or Description fields next to each item.

Note: It is important to note that InBloom increments check numbers from a starting check number. Thus, insert your check paper in your document printer in a manner that feeds the check paper in increasing consecutive check number order. In most document printers, the paper feeder tray (versus a paper feeder drawer) works in this manner - confirm with your printer manufacturer if you need additional help.

How To Print A List Of Pending Payments

InBloom can print a report of all of the sold and unpaid items from the Payments screen. Click the **Print List Of Pending Payments** button in the toolbar to generate a



Two Times Too Resale
Items Sold From To -

DATE	ITEM	DESCRIPTION	PRICE	FEE	DATE SOLD	SOLD PRICE	DATE PAID	AMOUNT PAID
1/19/06	3470-24	G. ARMANI Brown Silk Back Slit Pencil Skirt w/2 Slit Pockets	125.00		2/19/2007	50.00		
7/28/06	3470-37	VALENTINO Faded-Blue Denim Jean Skirt	49.00		1/16/2007	20.00		
7/28/06	3470-50	CK Lime & Orange Plaid Silk Shirt	19.00		1/9/2007	7.50		
7/28/06	3470-54	CHANEL Red Wool Pencil Skirt w/Stitched Stripes	149.00		3/7/2007	59.50		
7/28/06	3470-59	ZENOBIA Taupe Cotton Sleeveless Shirt Dress w/Hidden Placket	125.00		3/24/2007	25.00		
7/28/06	3470-61	DOLCE & G Black Wool Flat-Front Pants	125.00		4/16/2007	60.00		
7/28/06	3470-68	BLAHNIK Beige Linen Pumps w/Leather Toe	175.00		4/15/2007	175.00		
7 Item(s) To Be Paid to Ms. Kisha Pesin, Acct #3470								**Check Total:**
1/24/07	3477-25	MISSONI White Rayon/Viscose Knit Sleeveless Top w/Floral Print	95.00		5/14/2007	95.00		19.00
1 Item(s) To Be Paid to Ms. Jami Schrauger, Acct #3477								**Check Total: 19.00**
10/31/06	3490-12	LONGCHAMPS Black Leather Change Wallet w/Gold-tone Clasp	45.00		5/14/2007	36.00		0.00
5/5/07	3490-14	JOHNY MARTINI Tan Leather Sandals w/Natural Beaded Upper	95.00		5/24/2007	95.00		47.50
2 Item(s) To Be Paid to Ms. Catrina Navanjo, Acct #3490								**Check Total: 47.50**
11/8/06	3497-3	KOKAI Faded-Blue Cotton Cargo Pants	49.00		4/3/2007	9.75		
11/8/06	3497-7	BORDEAUX Brown Cotton/Lycra Top w/Pink lace Trim	49.00	1.00	3/17/2007	9.50		
11/8/06	3497-9	GANT Blue & Red Variegated Alpaca-Blend Cardigan	125.00		3/23/2007	25.00		
11/8/06	3497-11	COSABELLA Red Cherry-Print Nylon Thong	6.00		2/3/2007	6.00		
11/8/06	3497-17	MARTINEZ V. Black Nylon Stretch Heel Boots	95.00		1/5/2007	95.00		
11/8/06	3497-19	YSL Silvertone Button Pierced Earrings w/Blue R/S's	30.00		3/22/2007	40.00		
6 Item(s) To Be Paid to Ms. Monique Hedemann, Acct #3497								**Check Total:**
7/27/06	3498-44	I. MARSHALL Beige Acetate/Poly Long Skirt Suit w/Ivory Lining	149.00		3/27/2007	29.00		
7/27/06	3498-47	FERRAGAMO Black & Turquoise Pinstriped Pantsuit w/Gancini Closure	195.00		3/17/2007	39.00		
7/27/06	3498-50	C. LACROIX Paprika Wool Tie-Front Coat w/Silk-Print Lining	350.00		5/21/2007	140.00		0.00
12/11/06	3498-57	GALANOS Navy & Tan Floral-Print Silk Dress & Long Jacket	350.00		3/30/2007	280.00		
12/30/06	3498-74	CHANEL Coral & Metallic Silver Wool-blend Dress & Coat Set	1495.00		5/11/2007	598.00		0.00
12/30/06	3498-75	MISSONI Grey & Blue Houndstooth-Patterned Wool-Blend Knit Coat	750.00		5/26/2007	475.00		0.00
2/16/07	3498-93	N/L Red Wool Batwing Cardigan w/Blk Leather Trimmed Zipper	95.00		4/29/2007	95.00		
4/3/07	3498-106	ST. JOHN Black Santana-Knit Zipper-Front Long Jacket	450.00		5/12/2007	360.00		180.00

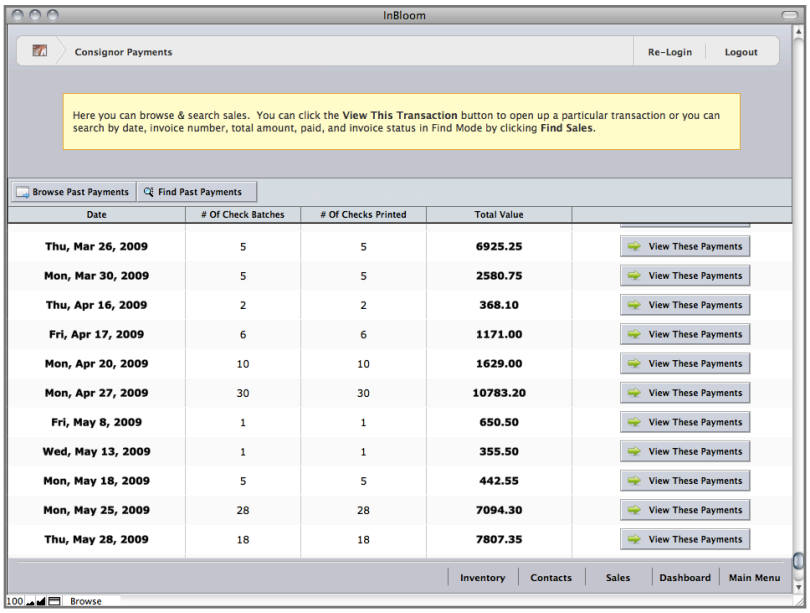
Page 1 **Batch Total: 9001.88**

report view of the pending payments.

Viewing Past Payments

InBloom keeps track of any previous payments made via store credit

or via check. To view the list, start at the Main Menu, click the **Consignor Payments** button, then click the **View Past Payments** button to view a summary list of payments by date.


InBloom
Consignor Payments
Re-Login
Logout
Here you can browse & search sales. You can click the View This Transaction button to open up a particular transaction or you can search by date, invoice number, total amount, paid, and invoice status in Find Mode by clicking Find Sales.
Browse Past Payments
Find Past Payments
Date
Of Check Batches
Of Checks Printed
Total Value
Thu, Mar 26, 2009 5 5 6925.25 View These Payments
Mon, Mar 30, 2009 5 5 2580.75 View These Payments
Thu, Apr 16, 2009 2 2 368.10 View These Payments
Fri, Apr 17, 2009 6 6 1171.00 View These Payments
Mon, Apr 20, 2009 10 10 1629.00 View These Payments
Mon, Apr 27, 2009 30 30 10783.20 View These Payments
Fri, May 8, 2009 1 1 650.50 View These Payments
Wed, May 13, 2009 1 1 355.50 View These Payments
Mon, May 18, 2009 5 5 442.55 View These Payments
Mon, May 25, 2009 28 28 7094.30 View These Payments
Thu, May 28, 2009 18 18 7807.35 View These Payments
Inventory
Contacts
Sales
Dashboard
Main Menu
Browse

Click the **View These Payments** button to view individual payments.

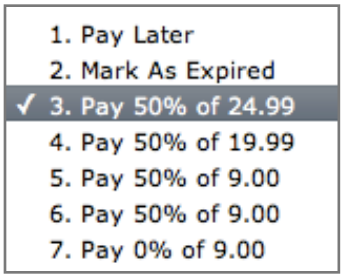
Modifying Consignor Payments

You can modify the payments of any specific items in the Payments window. InBloom is designed this way to give you the ability to manage any corrections that may be necessary if it calculates the price incorrectly or there was an error when the item was sold.

Items highlighted in yellow are where the item is paying below the sold price. This is designed to catch any entry errors when the item was sold.

Items highlighted in red are where the item is paying above the sold price and you are effectively overpaying the consignor.

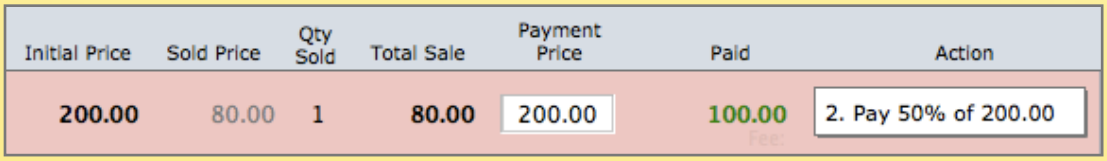
Items that are grayed out are items where they are set to be marked as expired.



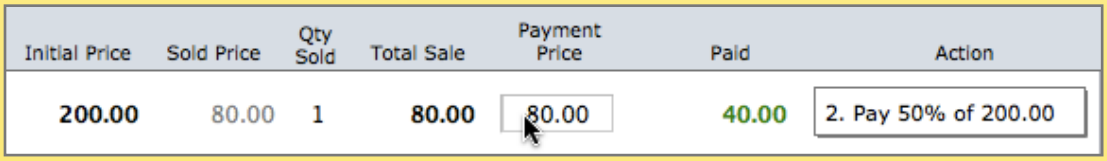
You can make any corrections to the Paid Amount based on the Payment Selection menu at the right of each item, which offers the payment options to according to the Price Code of the item. You can delay payment of the item until the next time requested (Pay Later), absorbing the sale of the item (Mark As Expired), or pay according to the price break down via the item's Price Code.

You can also edit the price items are paid at by changing the value in the Payment Price field.

For example: Let's say you take an item at 200.00 but sell it at 80.00 because the item is damaged, even though you do not have any kind of reduction set in the Price Code.



You'll need to manually click in the Payment Price field and change the value from 200 to 80. InBloom will use the percentage in the pulldown menu and automatically update the green amount to be paid.



Using InBloom With QuickBooks

If you use QuickBooks on Windows, you can sync your InBloom-generated payments with the QuickBooks check register using an add-on module which can be purchased from InBloomSoftware.com. **This module will only sync with the Windows version of**

QuickBooks, syncing with QuickBooks for Mac is not supported.
The following versions of QuickBooks are supported.

For use with QuickBooks US Versions (2006 - 2011):

- QuickBooks Simple Start
- QuickBooks Pro
- QuickBooks Premier/Accountant
- QuickBooks Enterprise

For use with QuickBooks UK, Canadian, and Australian Versions (2006 - 2011):

- QuickBooks Pro
- QuickBooks Premier/Accountant
- QuickBooks Enterprise

Step 1: Install The QuickBooks Plugin

You can install the QuickBooks plugin easily.

- Quit InBloom Lite / FileMaker Pro completely
- Download the plugin from the InBloomSoftware.com site, then locate the plugin which will have a ".fmx" extension
- Copy the actual plug-in and paste it to the Extensions folder which is inside the InBloom Lite folder or the FileMaker program folder. On Windows this is normally located here: C:\Program Files\FileMaker \FileMaker 11\Extensions
- Start InBloom Lite / FileMaker Pro. Confirm that the plug-in has been successfully installed by navigating to the "Preferences" menu option, then click the "Plug-ins" Tab. There you should see the plug-in listed

with a corresponding check box. This indicates that you have successfully installed the plug-in.

Once installed, make sure your computer is connected to the internet so you can register with the license server. This registration is a one-time process and does not require full-time access to the internet.

Step 2: Install the QBXMLRP2 file:

This installer is found in the QBXMLRP2 folder. Inside this folder you will find a file called: "QBXMLRP2Installer.exe". Please double click this file and run the installer.

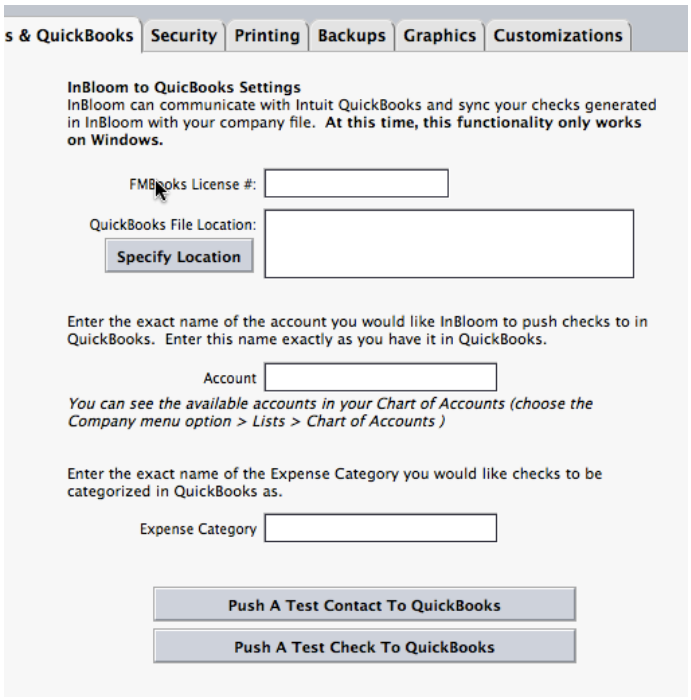
Step 3: Install the Microsoft XML Processor:

Included in the package is a download link for all users of Windows. Name of link is: "Install MSXML processor update from Microsoft (Required Install)"

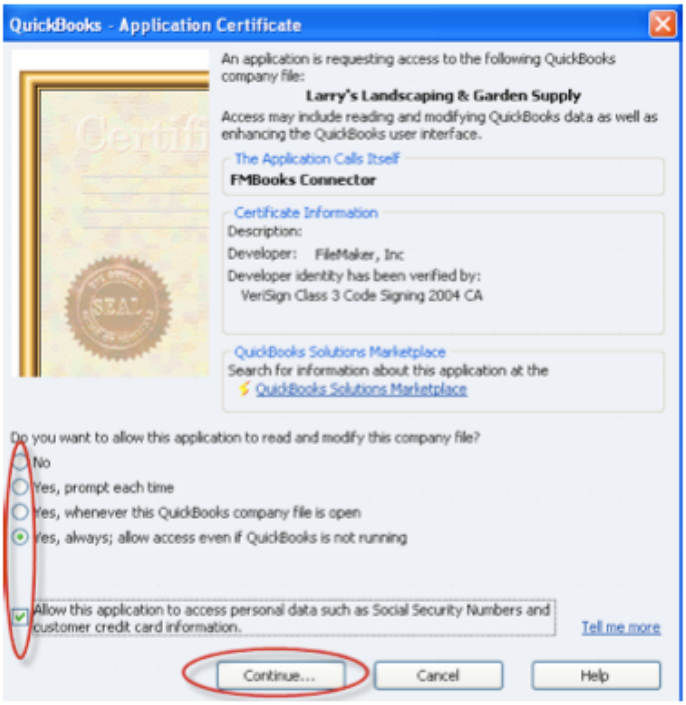
This link will direct you to install version 6 of the MSXML Processor from Microsoft.com. We use version 6 of the MSXML processor in the plug-in and require that you install this processor. Please save the file to your desktop and then run the file locally from your machine to ensure proper installation.

Step 4: Establish A Connection Between InBloom & QuickBooks

In InBloom, click on **Other Modules**, then click **Settings**, then click the **Payment Types & QuickBooks** tab. Enter the license # provided to you in your License email in the License # field. Make sure your Company file is open in QuickBooks and click **Push A Test Contact To QuickBooks**.


s & QuickBooks
Security
Printing
Backups
Graphics
Customizations
InBloom to QuicBooks Settings
InBloom can communicate with Intuit QuickBooks and sync your checks generated in InBloom with your company file. At this time, this functionality only works on Windows.
FMBooks License #:
QuickBooks File Location:
Specify Location
Enter the exact name of the account you would like InBloom to push checks to in QuickBooks. Enter this name exactly as you have it in QuickBooks.
Account
You can see the available accounts in your Chart of Accounts (choose the Company menu option > Lists > Chart of Accounts)
Enter the exact name of the Expense Category you would like checks to be categorized in QuickBooks as.
Expense Category
Push A Test Contact To QuickBooks
Push A Test Check To QuickBooks

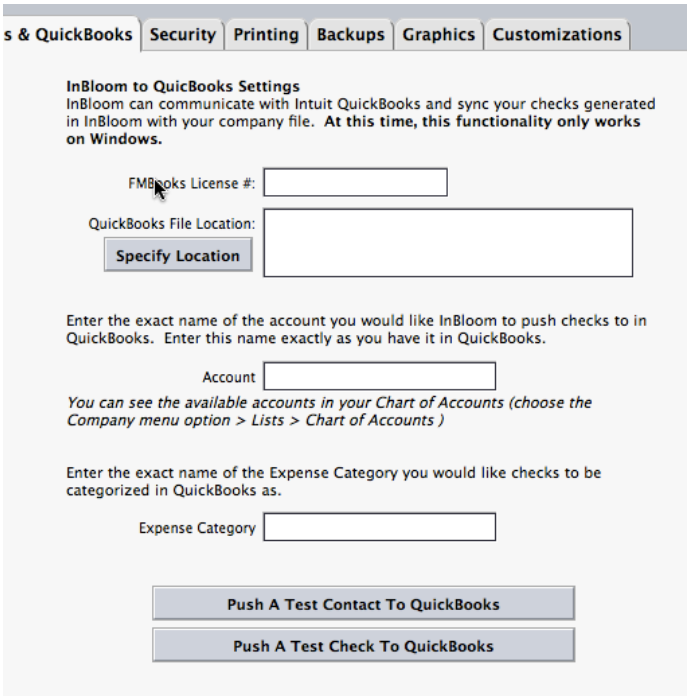
You will see a screen similar to the one to the right entitled "Application Certificate". Once this screen appears, select the appropriate radio button to continue and allow InBloom to communicate with QuickBooks. We recommend selecting the 4th radio button as shown below. These settings can be changed later in QuickBooks


QuickBooks - Application Certificate
An application is requesting access to the following QuickBooks company file:
Larry's Landscaping & Garden Supply
Access may include reading and modifying QuickBooks data as well as enhancing the QuickBooks user interface.
The Application Calls Itself
FMBooks Connector
Certificate Information
Description:
Developer: FileMaker, Inc
Developer identity has been verified by:
VeriSign Class 3 Code Signing 2004 CA
QuickBooks Solutions Marketplace
Search for information about this application at the
QuickBooks Solutions Marketplace
Do you want to allow this application to read and modify this company file?
No
Yes, prompt each time
Yes, whenever this QuickBooks company file is open
Yes, always; allow access even if QuickBooks is not running
Allow this application to access personal data such as Social Security Numbers and customer credit card information.
Tell me more
Continue...
Cancel
Help

under the Edit > Preferences > Integrated Applications Area in QuickBooks.

After these two steps InBloom will attempt to create a new Vendor in your QuickBooks file named "InBloom Shop Software" and alert you to any errors if the process was unsuccessful.

Step 5: Configure Your Bank Account & Vendor Categories

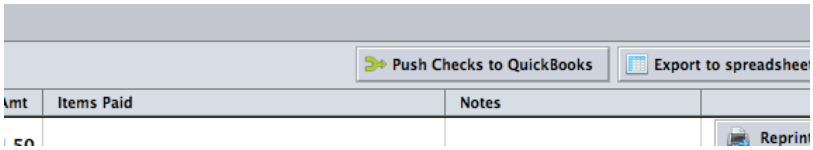

s & QuickBooks
Security
Printing
Backups
Graphics
Customizations
InBloom to QuicBooks Settings
InBloom can communicate with Intuit QuickBooks and sync your checks generated in InBloom with your company file. At this time, this functionality only works on Windows.
FMBooks License #:
QuickBooks File Location:
Specify Location
Enter the exact name of the account you would like InBloom to push checks to in QuickBooks. Enter this name exactly as you have it in QuickBooks.
Account
You can see the available accounts in your Chart of Accounts (choose the Company menu option > Lists > Chart of Accounts)
Enter the exact name of the Expense Category you would like checks to be categorized in QuickBooks as.
Expense Category
Push A Test Contact To QuickBooks
Push A Test Check To QuickBooks

In order for InBloom to sync checks with QuickBooks, InBloom must know which exact Account you use, as specified in QuickBooks, for checks. This is listed in the Chart of Accounts in QuickBooks (choose the Company menu option > Lists > Chart of Accounts). You must use the exact name of the account as specified in Quicken e.g. if you write checks from an account named "CitiBank Checking Acct", then you must enter the same name in the Account field.

In addition, you must also specify an Expense Category for each check to be categorized as. Create this category in QuickBooks first, then enter the exact name in the Expense Category field.

Once this is all set, you can test syncing a check by clicking **Push A Test Check To QuickBooks**. InBloom will attempt to sync an imaginary check for 550.55, for a series of items, and alert you to any errors if the process was unsuccessful.

Step 6: You're Ready To Sync!



Now you're ready to sync any batches of checks you have issued. Simply go to the **Main Menu** > **Other Modules** > click **View Past Payments** > click **View These Payments** for a particular batch. On the Payment List screen, click the **Push Checks To QuickBooks** button. InBloom will push every check to QuickBooks and alert you of any errors.

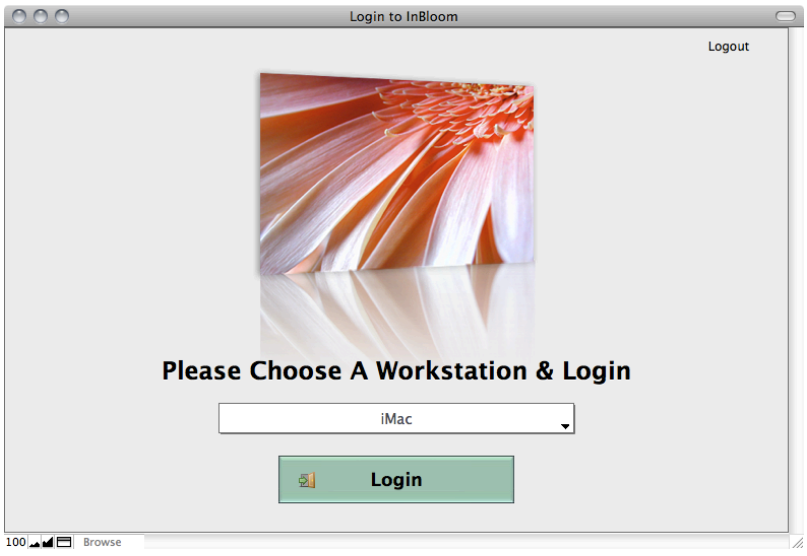
Configuring Printers, Barcodes & Cash Drawers

Installing Printers

InBloom can manage switching between three different kinds of printers for you in a seamless and straightforward fashion:

1. Your document printer
2. Your tag printer
3. Your receipt printer

In a multi-computer setup, you can configure each computer using InBloom to store its own unique printer settings as a "Workstation". This ensures that a front point of sale machine will always print to the front printer, rather than a back office printer. Likewise, this also ensures that InBloom can pre-select your label printer when printing tags.



Thus, when you login to InBloom you are always required to choose which Workstation settings you want to use. You can change these settings by choosing **Re-Login** from the top right corner of the Main Menu.

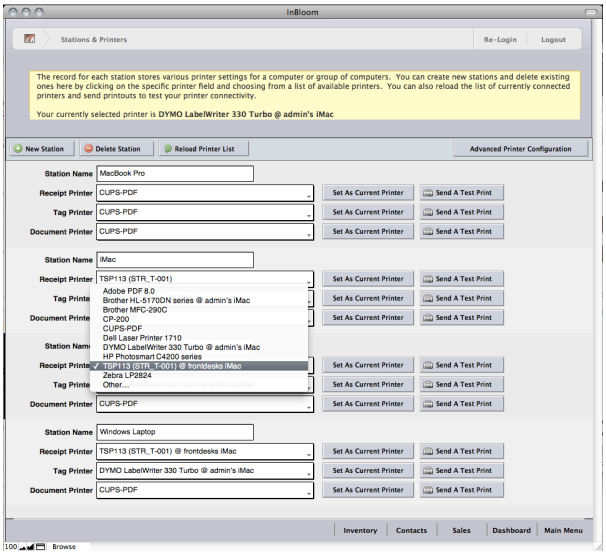
Note: Before you perform any installation and configuration of printers with InBloom, you must first go through the standard installation procedure recommended by your printer manufacturer. Once this is complete, you can configure printers with InBloom using the **Printers & Workstations** functionality.

Viewing Workstations

From the bottom left of the Main Menu, you can quickly determine which workstation setting you are currently using.

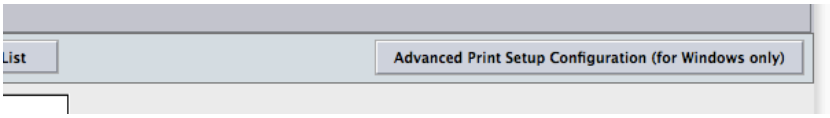
Managing Workstations

You can edit the printers for your workstation by clicking Main Menu > Other Modules > **Printers & Workstations**. In the Printers & Workstations window, click on the pulldown menu for each printer to choose the proper printer to use. If you are looking for a printer that is not appearing in the pulldown menu, click the **Refresh Printer List** button. If your printer is still not appearing, make sure it is properly installed on your computer and is powered on.

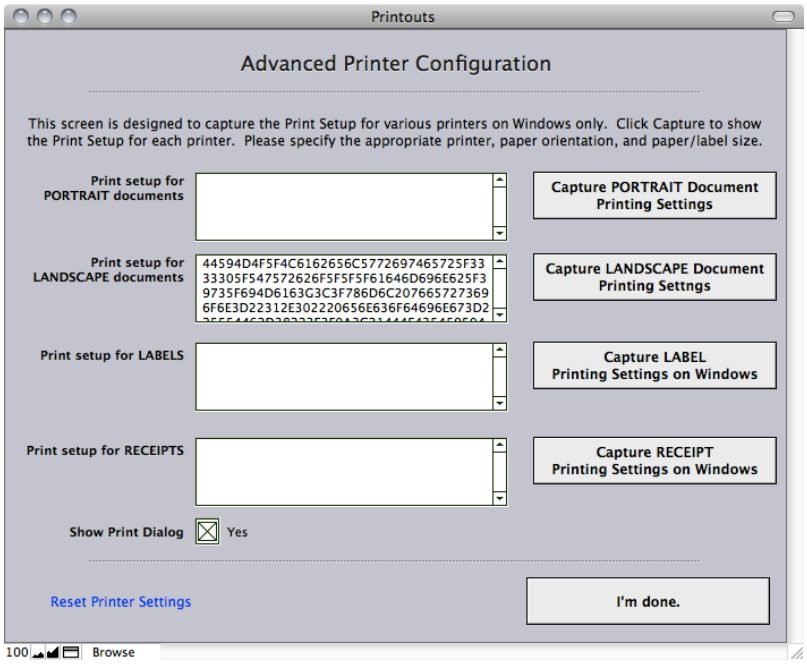


Configuring Printers On Windows

PCs can have more complex printer settings so InBloom provides a



deeper configuration for PC-specific setups. Simply click on the **Advanced Printer Configuration** button to manage these setups.


Printouts
Advanced Printer Configuration
This screen is designed to capture the Print Setup for various printers on Windows only. Click Capture to show the Print Setup for each printer. Please specify the appropriate printer, paper orientation, and paper/label size.
Print setup for PORTRAIT documents
Capture PORTRAIT Document Printing Settings
Print setup for LANDSCAPE documents
44594D4F5F4C6162656C5772697465725F33
33305F547572626F5F5F5F61646D696E625F3
9735F694D6163G3C3F786D6C207665727369
6F6E3D22312E302220656E636F64696E673D2
Capture LANDSCAPE Document Printing Settngs
Print setup for LABELS
Capture LABEL Printing Settings on Windows
Print setup for RECEIPTS
Capture RECEIPT Printing Settings on Windows
Show Print Dialog
Yes
Reset Printer Settings
I'm done.
100
Browse

On the Advanced Printer Configuration window, click the **Capture…** button for each format of your printer. InBloom will enter a series of numbers and letters if the capture was successful.

Click **I'm Done** when finished.

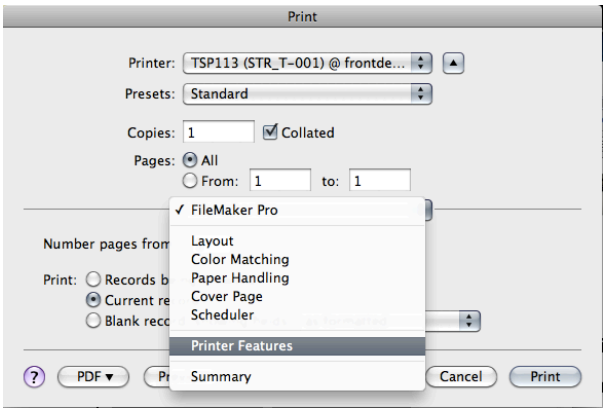
Configuring Cash Drawers on Macs

InBloom can use your Star Receipt printer to open an electronic cash drawer as soon as a transaction is complete. **Cash drawers do not work with InBloom in any other configuration - you can only use them by connecting through a Star printer.**

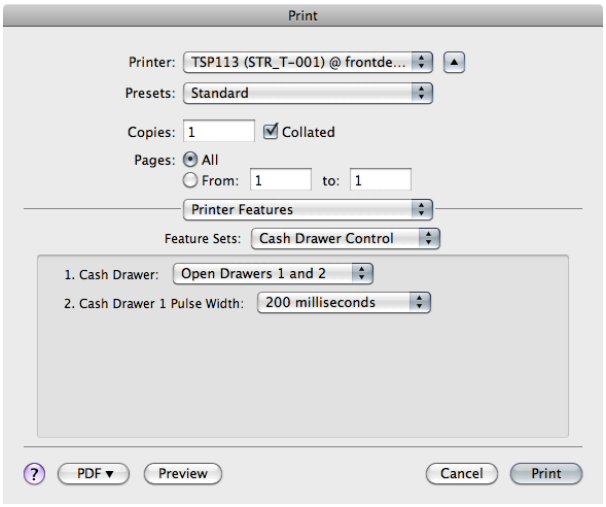
To begin configuration, first enable the Show Printer Dialog setting:

- From the Printers & Workstations screen, click the **Advanced Printer Configuration** button
- In the Advanced Printer Configuration screen, place a checkmark next to **Show Print Dialog**

- Click **I'm Done**
- From the Printers & Workstations screen, click the **Send A Test Print** button next to the Tag Printer field (it doesn't matter which workstation you choose).
- When the Print window appears, make sure the right triangle is aimed upwards to view all the print settings.
- From the pulldown menu in the middle, choose **Printer Features.**
- From the Feature Sets pulldown menu, click the **Cash Drawer Control** menu option.



- Set Option 1 to **Open Drawers 1 and 2**
- Set Option 2 to **200 milliseconds**
- From the Presets menu at the top, choose **Save As…**
- Enter **Open Cash Drawer**
- Make sure **Only this printer** has a bullet next to it
- Click **OK** to close the dialog
- Click **Print** on the bottom right of the print window
- A test receipt should print and the cash drawer will open automatically. This will now be the default behavior every time you process a sale and print a receipt.



Recommended Hardware

InBloom is designed to use FileMaker's powerful capabilities to network between printers and multiple computers. We recommend the following hardware, but note that you may be able to use any of your existing printers, scanners, or cash drawers, if you are transitioning from another computer and/or software package. Download and run the InBloom demo to test any hardware that is not specifically recommended.

Receipt Printers

Star Micronics TSP 100 futurePRNT printers are highly recommended for low-cost, fast, and reliable thermal receipt printers. These black and white printers are PC and Mac compatible, print direct on thermal paper with no inks necessary, and come in black or "putty" color enclosures. In addition, they can also be modified to have an auto-tear bar which slices receipt prints for the user, rather than tearing by pulling against a small blade bar. Thermal printers from other TSP models or other manufacturers should be compatible. Again, we recommend testing against an InBloom demo version.

Star Micronics Model Numbers

- Tear Bar: **TSP113U** or **TSP113U-GRY**
- Auto-Cutter: **TSP-143U** or **TSP-143U-GRY**

Laser or Inkjet Document Printers

Brother Laser Printers offer affordable network-ready laser printers with both two-sided printing and two paper trays included. But just about any inkjet or laser printer can be easily connected to InBloom. You can use these printers for printing contracts, checks, various reports, sheets of mailing labels and more. If you plan on using or purchasing another kind of laser printer, it is recommended that the printer have a multi-purpose

tray of up to 50 pages, which can be used for printing checks more easily.

Label Printers

InBloom supports the DYMO LabelWriter 300, 330, 400, 450 and newer Dymo printers for adhesive product labels to be used with price tags.

Label Printer Models:

- Dymo LabelWriter 300 / 330 / 330 Turbo
- Dymo LabelWriter 400 / 450 / 450 Turbo

Cash Drawers

There are currently only two ways to connect a cash drawer to an InBloom station. You must connect the drawer to a Star Micronics printer or use a serial cable and a serial-to-USB adapter for a direct computer connection. We recommend connecting through a Star printer as the best method.

Drawer Models:

- APG Vasario Cash Drawer VB320-BG1616
- APG Vasario Cash Drawer VB320-BG1915
- APG Vasario Cash Drawer VB320-BG1618

Barcode Scanners

We recommend the Metrologic Voyager CG barcode scanner for use with InBloom. Any barcode scanner that can be configured to add a carriage return (the equivalent of hitting the "Return" or "Enter" key on the keyboard) is usable with the InBloom Sales module. Check with your scanner's documentation to verify that it comes with driver software that can manage this configuration.

Scanner Models:

- Metrologic MK9540-32A38-BLK-USD Voyager CG Barcode Scanner
- Unitech MS210 CCD Barcode Scanner
- Honeywell 3820 Wireless Barcode Scanner

Installing Barcode Fonts

In the Barcode folder you will find six different sizes of the same Code 128 Barcode symbology, in a True Type Font format. Install these in your default Font folders. The instructions for how to do so on Mac & Windows, follows, respectively:

Installing Barcode Fonts on Mac OS X

To install the barcode fonts in Mac OS 10.3.x and later:

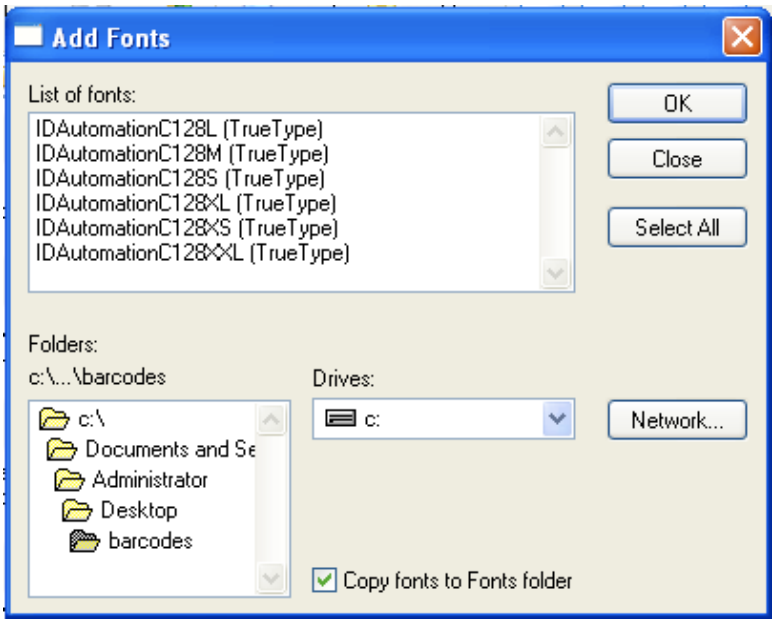
- Download the fonts from InBloomSoftware.com/downloads
- Find the downloaded file on your Mac and double-click it to unzip it.
- Doubleclick each of the font files. The Font Book application will open and preview the font.
- Click **Install Font**

Installing Barcode Fonts on Windows

In Windows XP you can simply drag all of the font .TTF files from this folder to the Fonts folder accessed through your Windows Control Pant or you can use Windows' installer tool:

- Download the fonts from InBloomSoftware.com/downloads
- Find the downloaded file on your PC and double-click it to unzip it.
- Choose Start > **Control Panel**
- Click the **Appearance & Themes** control panel
- Click the **Fonts** folder on the top left of the window.
- From the File menu, choose **Install New Font**.
- Locate the fonts you want to install. In the Folders list, select a folder that contains the fonts you want to install. (Make sure you have unzipped them first.) The fonts in the folder appear under List of Fonts. Select the fonts to install. To select more than one font, hold down the CTRL key and click each font. Your font selection should

look something like this:



- Click **OK** to install the fonts.

Markdown Manager

Managing Price Codes & Reductions

InBloom stores all of your price reduction and consignor split information as a simple code associated with each piece of inventory.

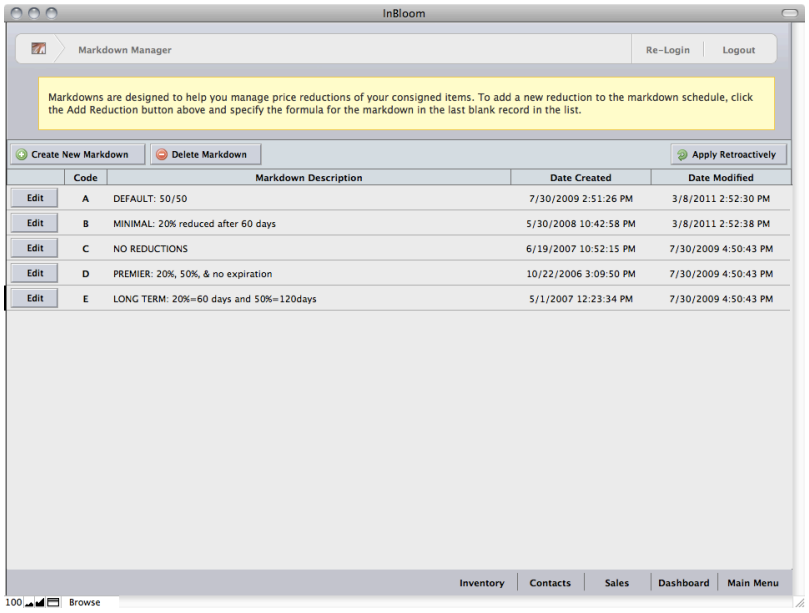
Acct.
#
Designer
Description
Price
Fee
Size
Category
Code
Qty
On Hand
Status
1000 1 Levis Faded Blue Denim Boot-Cut Jeans 20.00 29 Boots A 10 0 Mixed
1000 2 Gucci Black Cotton Skinny Jeans 40.00 29
1000 3 Juicy Couture Pink Cotton Terry Cloth Zip-up Sweatershirt 24.99 M
1000 4 Juicy Couture Neon Green Terry Cloth Sweatpants 24.99 L
A DEFAULT: 50/50
B MINIMAL: 20% reduced after 60 days
C NO REDUCTIONS
D PREMIER: 20%, 50%, & no expiration
E LONG TERM: 20%=60 days and 50%=120days

This ensures that each item is payed at the proper commission rate and is reduced when transacted in a sale. Most codes are assigned as a single letter but they can be any string of letters and numbers. Once you assign the code a descriptive name, you can always see the description when choosing the code.

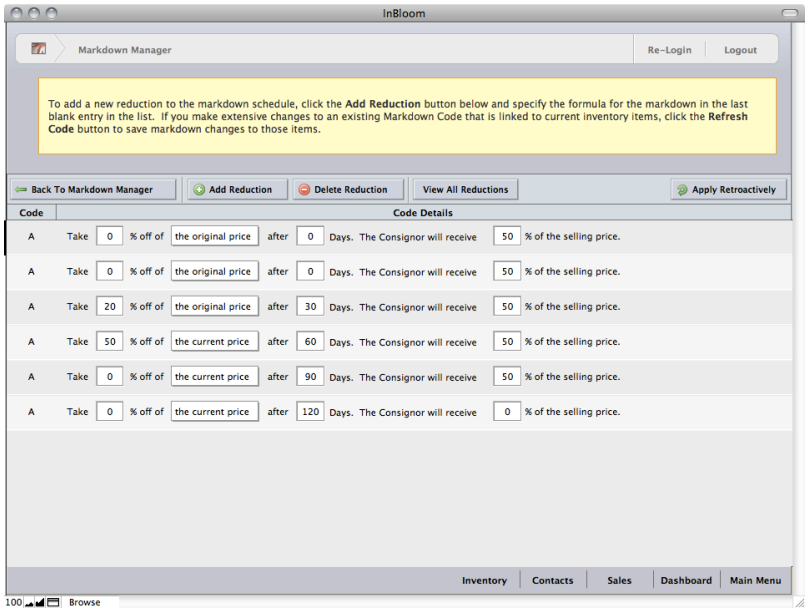
Adding, Editing, & Deleting Price Codes

The Markdown Manager is used to define and manage Price Codes for your inventory. To begin creating, activating/deactivating, or deleting Markdown Codes:

- Go to the **Main Menu**
- Click **Other Modules**
- Then click **Markdown Manager** to display the Markdown Code Manager screen


InBloom
Markdown Manager
Re-Login
Logout
Markdowns are designed to help you manage price reductions of your consigned items. To add a new reduction to the markdown schedule, click the Add Reduction button above and specify the formula for the markdown in the last blank record in the list.
Create New Markdown
Delete Markdown
Apply Retroactively
Code
Markdown Description
Date Created
Date Modified
Edit A DEFAULT: 50/50 7/30/2009 2:51:26 PM 3/8/2011 2:52:30 PM
Edit B MINIMAL: 20% reduced after 60 days 5/30/2008 10:42:58 PM 3/8/2011 2:52:38 PM
Edit C NO REDUCTIONS 6/19/2007 10:52:15 PM 7/30/2009 4:50:43 PM
Edit D PREMIER: 20%, 50%, & no expiration 10/22/2006 3:09:50 PM 7/30/2009 4:50:43 PM
Edit E LONG TERM: 20%=60 days and 50%=120days 5/1/2007 12:23:34 PM 7/30/2009 4:50:43 PM
Inventory
Contacts
Sales
Dashboard
Main Menu
100
Browse

- Click the **Create New Markdown** button to begin creating a new price reduction schedule. InBloom will auto enter a value for the Code field and a description. Change the description to whatever informative label will help you with remembering what this Code relates to.
- To modify an existing Markdown Code, click the **Edit** button on the left of the respective line - the Markdown Schedule Manager will be displayed.


InBloom
Markdown Manager
Re-Login
Logout
To add a new reduction to the markdown schedule, click the Add Reduction button below and specify the formula for the markdown in the last blank entry in the list. If you make extensive changes to an existing Markdown Code that is linked to current inventory items, click the Refresh Code button to save markdown changes to those items.
Back To Markdown Manager
Add Reduction
Delete Reduction
View All Reductions
Apply Retroactively
Code
Code Details
A Take 0 % off of the original price after 0 Days. The Consignor will receive 50 % of the selling price.
A Take 0 % off of the original price after 0 Days. The Consignor will receive 50 % of the selling price.
A Take 20 % off of the original price after 30 Days. The Consignor will receive 50 % of the selling price.
A Take 50 % off of the current price after 60 Days. The Consignor will receive 50 % of the selling price.
A Take 0 % off of the current price after 90 Days. The Consignor will receive 50 % of the selling price.
A Take 0 % off of the current price after 120 Days. The Consignor will receive 0 % of the selling price.
Inventory
Contacts
Sales
Dashboard
Main Menu
100
Browse

In this screen you can create an unlimited number of scheduled reductions for each Markdown Code. Each reduction is configured in a natural-language editor i.e. "Take 50% off of the original price after 60 days. The Consignor will receive 40% of the selling price."

Note: You must enter in a zero day reduction for all reduction codes. This code should occur on the 0 days and have a default split (such as 50%) that is usually given to the Consignor.

Price Codes and Markdown Schedules are one of the most effective ways to automate the price reduction of any and all merchandise in your business as well as manage the commission between your business and your consignors.

An Example Price Code

If your business takes items for two months and reduces the price every two weeks by 10%, then 20%, then 30%, then 40% with the consignor receiving 50%, your reduction schedule would read as follows:

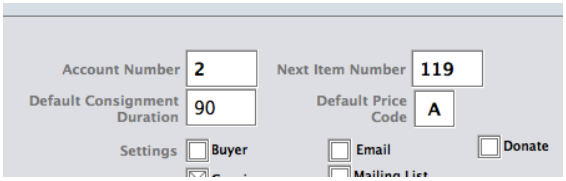
- Take **0%** off of **the original price** after **0** days. The Consignor receives **50%** of the selling price.
- Take **10%** off of **the original price** after **15** days. The Consignor receives **50%** of the selling price.
- Take **20%** off of **the original price** after **30** days. The Consignor receives **50%** of the selling price.
- Take **30%** off of **the original price** after **45** days. The Consignor receives **50%** of the selling price.
- Take **40%** off of **the original price** after **60** days. The Consignor receives **50%** of the selling price.

If you wanted to take an additional 20% off of the already reduced price after 12 weeks but have the items expire and the Consignor receive 0%, you would add the following:

- Take **20%** off of **the current price** after **120** days. The Consignor receives **0%** of the selling price.

Setting Default Price Codes

You can set a single price code, e.g. Code C, to be the default for every new item you add to InBloom. This is done through the Settings module and is further discussed in the Inventory section of the Settings chapter.



In addition, you can set a default price code on an account basis. So, if you have a subset of consignors that you want to have a different commissions percentage or reduction schedule, you can specify this using the **Default Price Code** field on the Contact Detail or Consignor Info screens. Whenever you add new items to this Consignor's account, the items will be auto-assigned this Default Price Code.

Modifying A Price Code

If you change the settings for a Price Code i.e. adding new reductions, deleting reductions, changing consignor commission percentages, etc. the changes only affect inventory you add after having made the changes. If you would like to apply the changes to the existing Inventory, click the **Apply Retroactively** button in the toolbar.

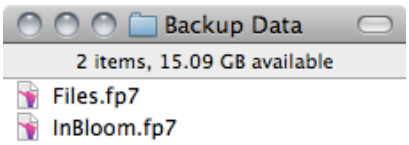
Backups & Security

The Basics Of Backing Up Your Data

Without question, backing up your data is an important business function. InBloom features three different forms of data backup both of which occur **upon logout**. Thus, in order for InBloom to backup in network setups, the database must be closed or an independent trigger (Windows Batch files, cron scripts, iCal daily events, etc.) must initiate the backup process.

In case of power outages, natural disasters, monsters attacking, and other unknowns, it's always good to have a backup of your InBloom Data. Fortunately, InBloom is very easy to backup and if you have backup software already running on your machine, you InBloom can work in concert with it. Here's a brief intro on the three backup types that InBloom offers:

A Full Non-Dated Backup

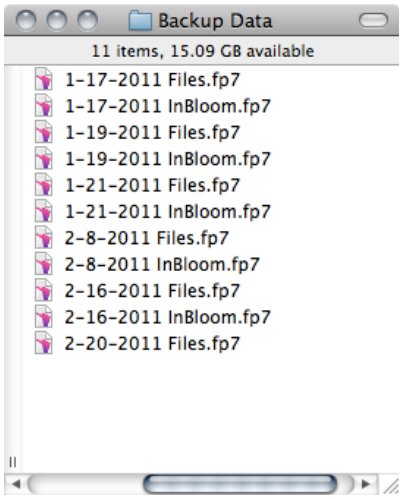


A **Full Non-Dated Backup** saves a duplicate, but optimized and compressed version of your data all in one file; **however, the file is NOT dated and each back will overwrite the previous backup.**

This backup type is primarily designed for users who already have backup software in place such as Apple's Time Machine or other 3rd party software. Most backup software will maintain the dated versions of the InBloom database for you. In addition, this can be useful if you simply want to copy the latest

compressed version of your database to an external hard drive such as a USB stick.

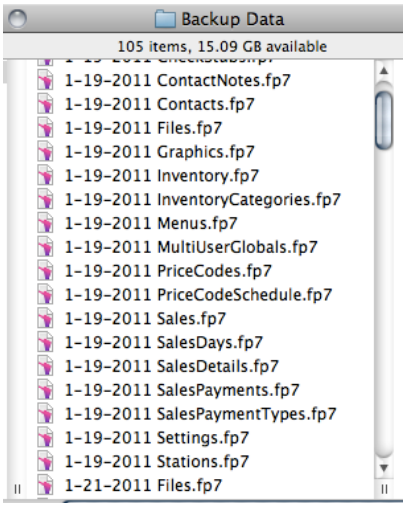
A Full Backup



A **Full Backup** saves a duplicate, but optimized and compressed version of your data all in one file. The file is dated according to the creation date and stored in your Backup Data folder inside your InBloom folder.

Because you are saving dated and versioned copies of your database, this option is secure and reliable but takes up much more room on your hard drive. This backup type is useful if you are not using automated backup software and are copying your essential files manually to some form of external hard drive.

A Data Only Backup



The **Data Only** backup type exports all of your information into several distinct FileMaker databases. The files are dated according to the creation date and stored in your Backup Data folder inside your InBloom folder.

This backup type is used especially when doing a full database upgrade or when

recovering from a hard crash with a damaged InBloom Database file.

Restoring From A Backup

If you need to restore from a backup, there are two different methods:

1. You can quickly swap the InBloom Data file from the Modules folder within the InBloom folder with a backup from the Backup Data folder, or
2. You can download a new copy of InBloom from InBloomSoftware.com/downloads and restore from a Data Only backup

Swapping A Data File

This is the quickest way to restore your InBloom data and can be done in under a minute. It's important to note that if by doing this, you are reverting your copy of InBloom to the last saved backup and that any changes you made since that backup will not be present in the restore.

To begin:

- Make sure to close out of InBloom
- Go to your InBloom folder on your computer
- Go to the Modules folder inside the InBloom folder

- Find the file named **InBloom Data** and rename it to **InBloom Data OLD** (include the same extension in the file name e.g. rename InBloom Data.IBL to InBloom Data OLD.IBL)
- Make a note whether your file ends in .IBL or .FP7
- Go to the Backup Data folder inside your InBloom folder, and find the file named **InBloom.fp7**.
  Or, if you have dated files, find the most recent file with a date in the name e.g. **1-2-2011 InBloom.fp7**.
- Drag this file inside the Modules folder you had previously renamed the Data file in
- Rename the file you just dragged to **InBloom Data**
- Make sure to include the same file extension i.e. .IBL or .FP7 as the rest of the files in that folder
- Reopen InBloom as you would normally
- You're all done!

Restoring From A Data Only Backup

This is the best way to restore your data from a bad computer crash or if you are upgrading to a brand new copy of InBloom. It takes a couple of minutes to perform but it's important to note that if by doing this, you are reverting your copy of InBloom to the last saved backup and that any changes you made since that backup will not be present in the restore.

To begin:

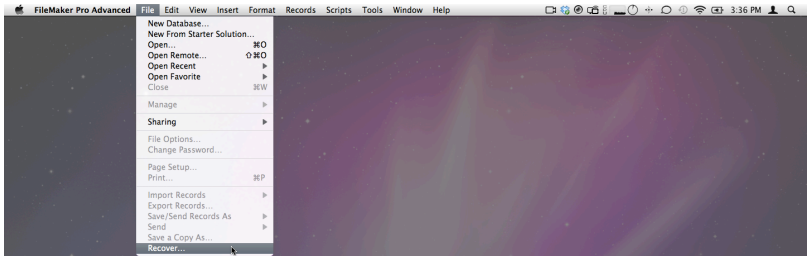
- Download a new copy of InBloom from InBloomSoftware.com/downloads
- Unzip the new copy of InBloom you just downloaded

- Make sure to close out of your existing copy of InBloom
- Go to your InBloom folder on your computer
- Go to the Backup Data folder inside the InBloom folder
- Select all the files with the latest backup date in their name
- Drag these files from the old Backup Data folder to the new Backup Data folder inside the new InBloom folder you downloaded in Step 1
- Reopen InBloom as you would normally
- Click the Upgrade InBloom button
- Specify the date of the files you are using as a restore point
- Click **Continue Restore**
- Note that you've now setup an entirely new copy of InBloom so your old username and passwords were not imported.
- You're all done!

Recovering From A Damaged File

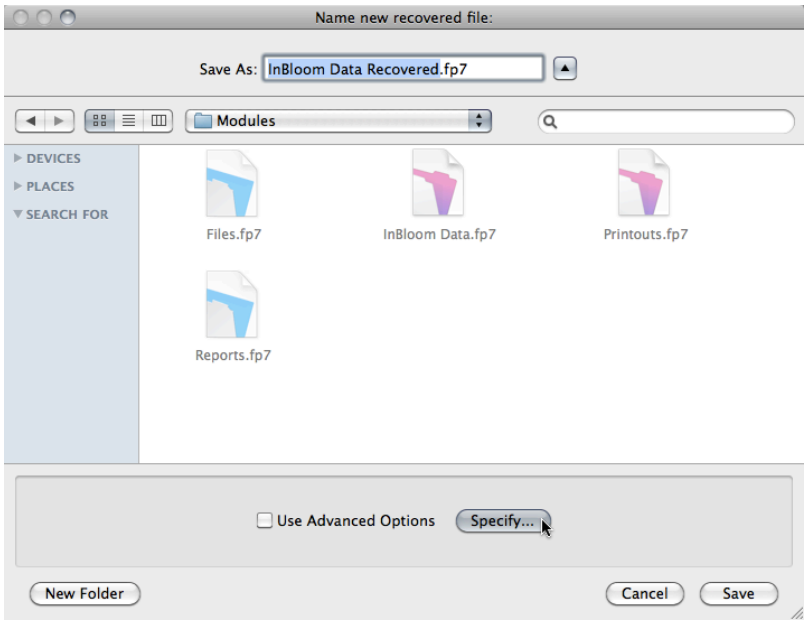
When monsters attack and a bad crash happens, sometimes your InBloom database will be corrupted because of the sudden, unexpected closure of the file. **You can only recover from a damaged file using FileMaker Pro. InBloom Lite customers must contact Support to have their file repaired.**

You can temporarily repair a file using the Recover command from the File menu in FileMaker Pro.

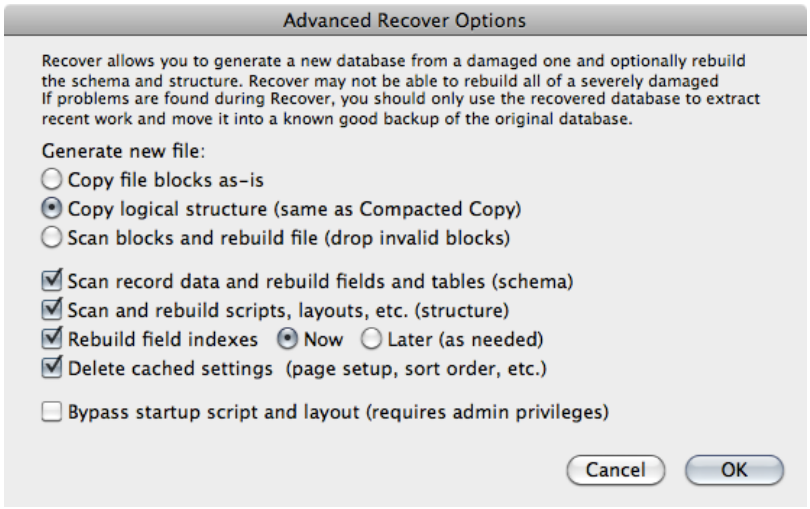


Next, select the InBloom Data.fp7 file from the Modules folder within your InBloom folder.

In the next window specify the Modules folder within your InBloom folder and leave the name that is pre-specified as InBloom Data Recovered.



Then click the Specify button next to Advanced Options at the bottom of next screen.


Advanced Recover Options
Recover allows you to generate a new database from a damaged one and optionally rebuild the schema and structure. Recover may not be able to rebuild all of a severely damaged
If problems are found during Recover, you should only use the recovered database to extract recent work and move it into a known good backup of the original database.
Generate new file:
Copy file blocks as-is
Copy logical structure (same as Compacted Copy)
Scan blocks and rebuild file (drop invalid blocks)
Scan record data and rebuild fields and tables (schema)
Scan and rebuild scripts, layouts, etc. (structure)
Rebuild field indexes
Now
Later (as needed)
Delete cached settings (page setup, sort order, etc.)
Bypass startup script and layout (requires admin privileges)
Cancel
OK

In the next screen, make sure the Copy logical structure (middle bullet) is selected. Click OK. FileMaker will scan and retrieve any and all information from the database and let you know of the results in a dialog window.

Once you see the Recovery completion dialog, go to your Modules folder, rename "**InBloom Data**" to "**InBloom Data DAMAGED**"; then rename "**InBloom Data Recovered**" to "**InBloom Data**". This will make the recovered data file your primary database and you should be able to open InBloom again as you did before. Because you are working on a recovered file, it is strongly recommended that you do a Data Only backup and then restore your information into a new copy of InBloom. The restore process is explained above in the Restoring From A Data Only Backup section.

Backup Considerations

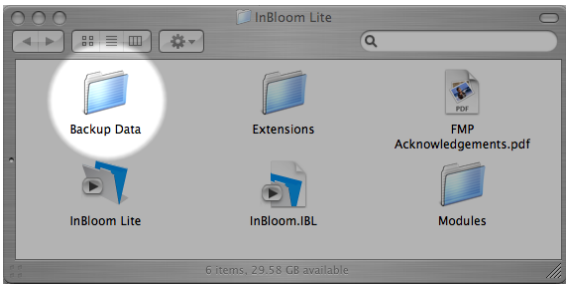
There are several important considerations for backing up your data. When saving backup information as Data Only, the data files that are subsequently created do not have any password protection. Thus, any potential user with a copy of FileMaker would be able to read this information. You may want to store these data files in a secure location by copying on to an external hard drive of removable disk of some kind (USK key drive, iPod, etc.), and then delete the data files from your computer.

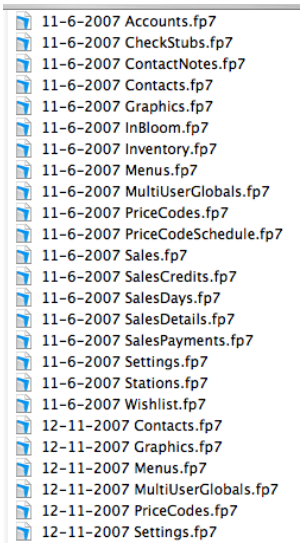
Backup Frequency

No two businesses are alike. Therefore it is only our recommendation to have InBloom backup daily. The general rule of thumb is to determine if loss of one day, one week, one month's work would be catastrophic. If so, increase the backup frequency until you determine that a data loss would **not** be catastrophic.

Backup Structure

InBloom stores all backup files in the Backup Data folder in your InBloom folder. Opening this folder will show all backup files. In the case of Full Backups and Data Only backups, all files are stored with dates as prefixes in the Backup Data folder.





Notes About Restoring & Upgrading

There are two components which are not imported into your new version of InBloom:

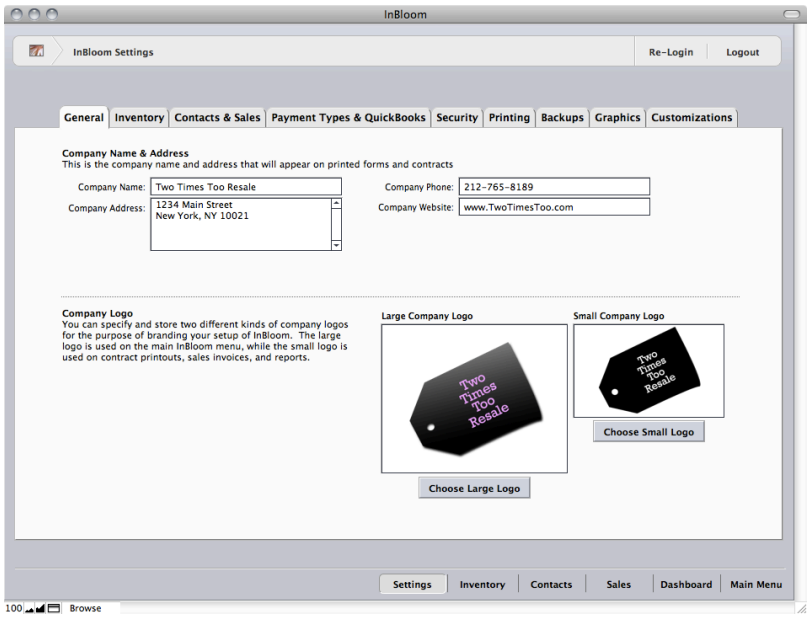
- Your new version of InBloom does not have any of the original usernames and passwords from your previous version. You must re-enter all users with the User module.
- All value list changes in the Settings module must be re-entered. This includes Inventory Size, Contact Title, Contact State, Contact Phone Labels, Contact Source, and Sales Invoice Sold By.

Settings

Managing Your InBloom Settings

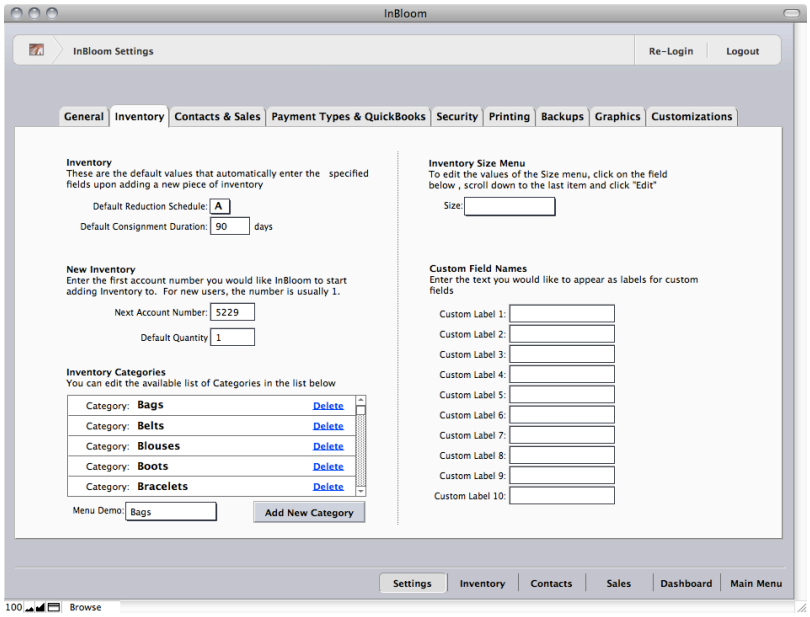
The Settings module features multiple tabs at the top with several different modifications of functionality. They are described by tab order from left to right.

General Tab

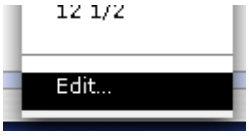


Use this tab to modify your company name, address, phone, website, and logo that are all used for printing purposes on receipts and contracts. You can specify a large company logo used to brand your copy of InBloom and make it yours. The file specified as the logo must be a PNG, GIF, JPG, or PICT file. In addition, a separate field used to store an optimized logo especially for printing is available. This small logo is generally in black and white and can also be a PNG, GID, JPG, or PICT file.

Inventory Tab

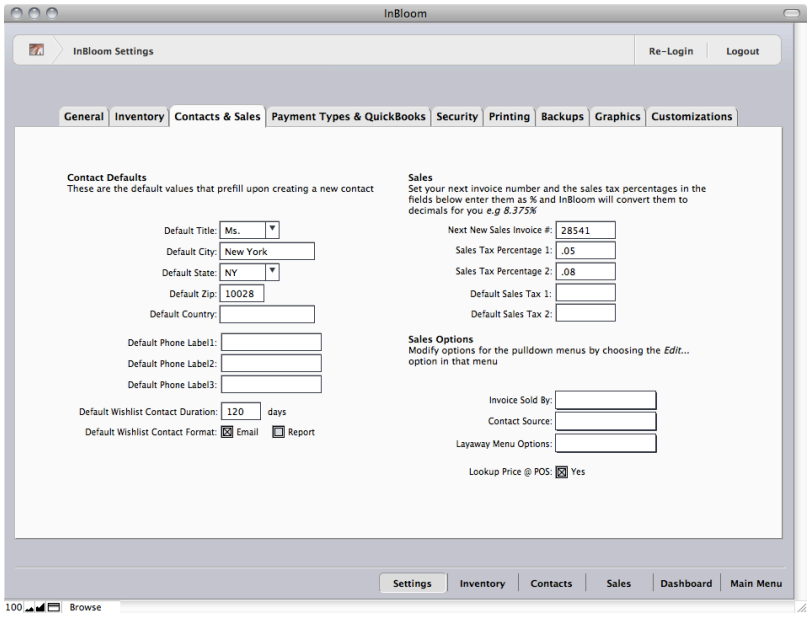


Use this tab to modify the defaults that prefill when you create a new inventory item such as the Price Code and the Consignment Duration, the options for the Size and Category pulldown menus on Inventory items, the next new account number when creating a new consignor account, and the labels/names of the custom fields available in the Inventory (on the Item Details view).



You can change the options available in the Size pulldown menu by clicking on the menu and choosing the Edit option. This displays a dialog that lets you customize the menu with any options you prefer. You can also enter a dash character "-" to separate menus into groups.

Contacts & Sales



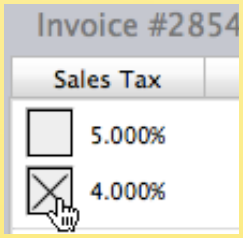
The Contacts & Sales tab lets you modify the default prefill information for new Contacts records and for Sales records, as well as the pulldown menu options available in both.

For Contacts, you can specify default values for the Contact Title, City, State, Zip, Country, and Phone Labels 1-3. These values will be automatically entered when you create a new buyer or consignor. You can edit the menu options for the Title, Contact Source, Phone Label, and State fields here as well.

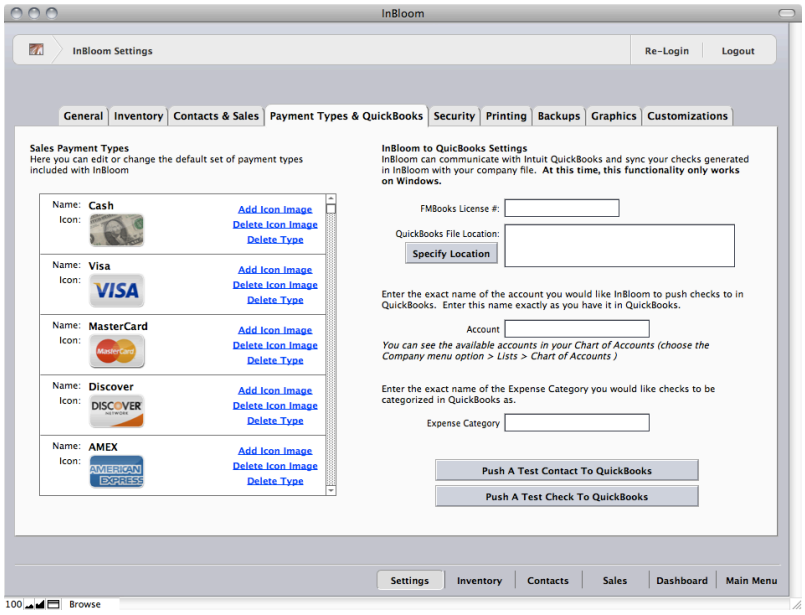
For Sales, you can edit tax percentages as well as edit tax percentage defaults, salesperson names, and whether you would like the Sales module to lookup prices when adding new items to Sales Invoices.

An example of specifying your taxes:
Let's say you have a state tax of 5% and local tax of 4%, you can enter each as Sales Tax Percentage 1 and Sales Tax Percentage 2.

If you want to have the 5% tax applied automatically to every item you sell, enter 5 in Default Sales Tax 1. With these settings, your 5% tax will be automatically applied and you can apply the 4% tax on an item-by-item basis. Both taxes can be managed on each item as you sell the item by checking or unchecking the appropriate tax checkbox on an item in a Sale invoice.



Payment Types & QuickBooks Settings



The Payment Types list lets you add, remove, and modify the icon for the available payment types when writing a sale. Note that you must

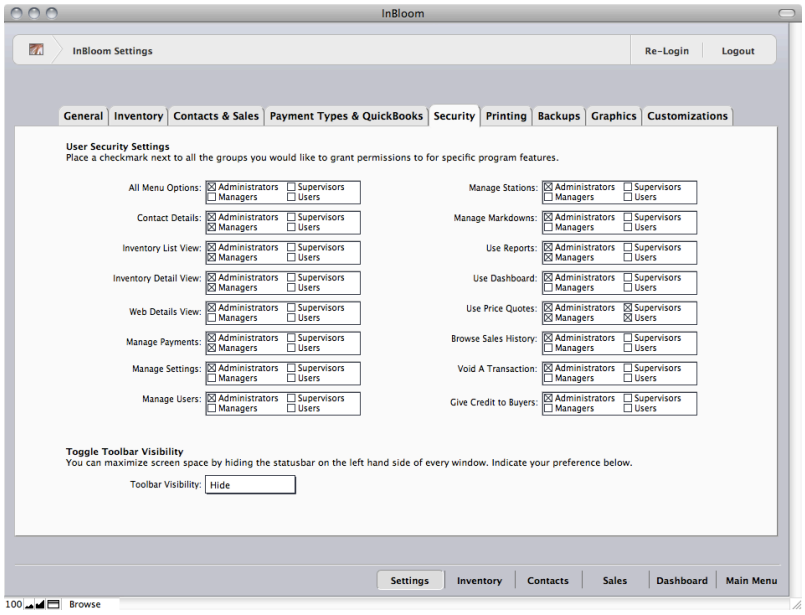
have an option named Store Credit in order to use the feature where consignors can pay with existing store credit.

The QuickBooks settings are all the fields needed to configure the export of your information from InBloom to QuickBooks. Here is a specification of what each field is expecting if you plan on using this functionality.

Field	Function
FMBooks License #	InBloom syncs to QuickBooks using an add-on module which can be purchased from InBloomSoftware.com. This add-on module includes a license number which must be entered here
QuickBooks File Location:	This field store the exact path of your QuickBooks Company file. If QuickBooks is not open when you perform the sync operation, you must have specified the path (by clicking the **Specify Location** button). If you always sync when QuickBooks and your company file is open, then this field does not require a value.
Account	When InBloom syncs any checks to QuickBooks, the checks must be issued from a (bank) account you have specified in the QuickBooks Chart Of Accounts. The name in this field must exactly match the Account name in QuickBooks. So if you have a checking account in QuickBooks named "CitiBank Checking", and this is the account you would like checks to be noted under in QuickBooks, enter the exact "CitiBank Checking" name in this field in InBloom.
Category	This is the exact name of the Expense Category you would like your checks to be categorized as when synced with QuickBooks.

Before syncing with QuickBooks, we recommend testing the configuration settings by using the **Push Test Contact…** and **Push Test Check…** buttons. View the section on QuickBooks syncing for more details.

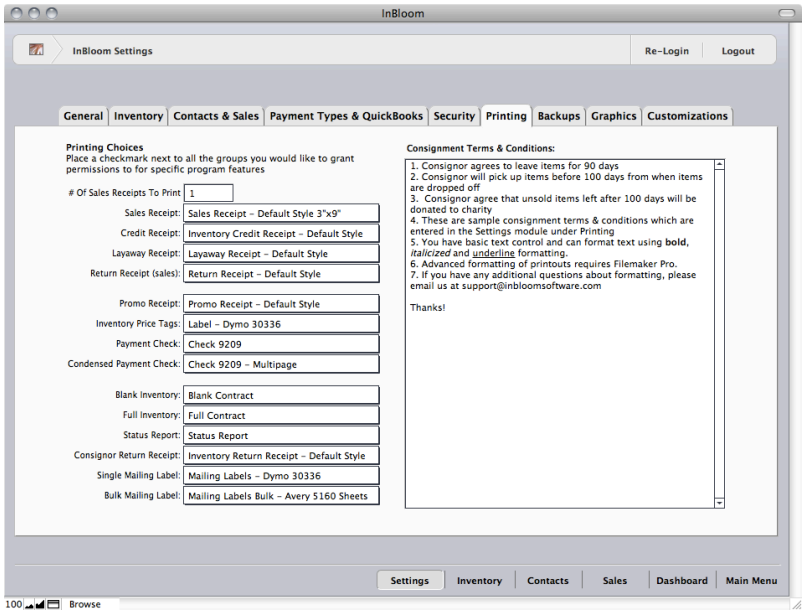
Security



InBloom offers multiple layers of security to protect your information. You can use the options available in the Security tab to limit user access to features such as check printing, displaying the dashboard, the Inventory List View, inventory price research functionality, and more. This is done by placing checkmarks for the the group of users you would like to give access to. To learn more about User Groups, read the Adding & Managing Additional Users section.

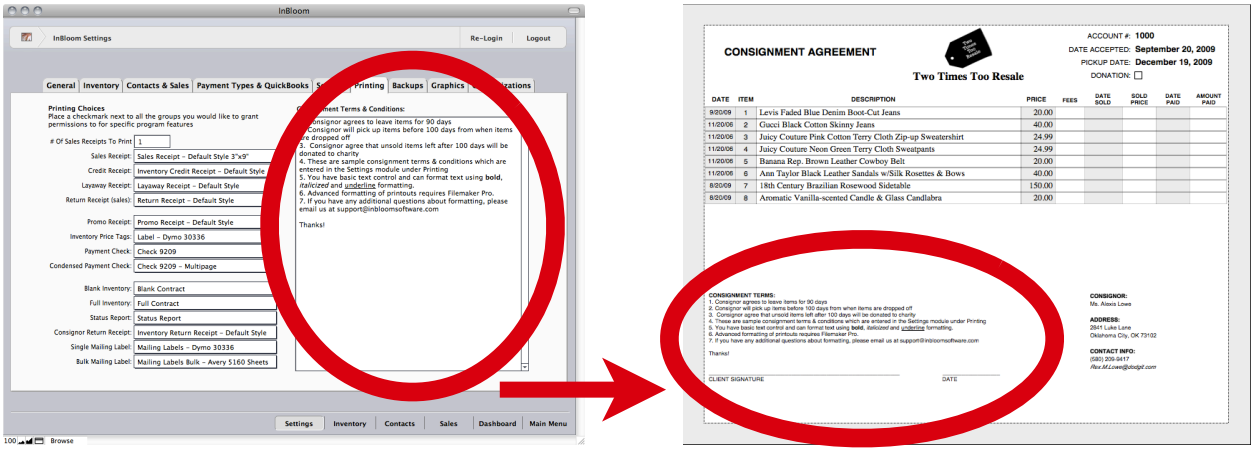
You can also choose to have InBloom open each new window with or without the default FileMaker toolbar located on the top. Select your preference under the Toggle Toolbar Visibility setting.

Printing

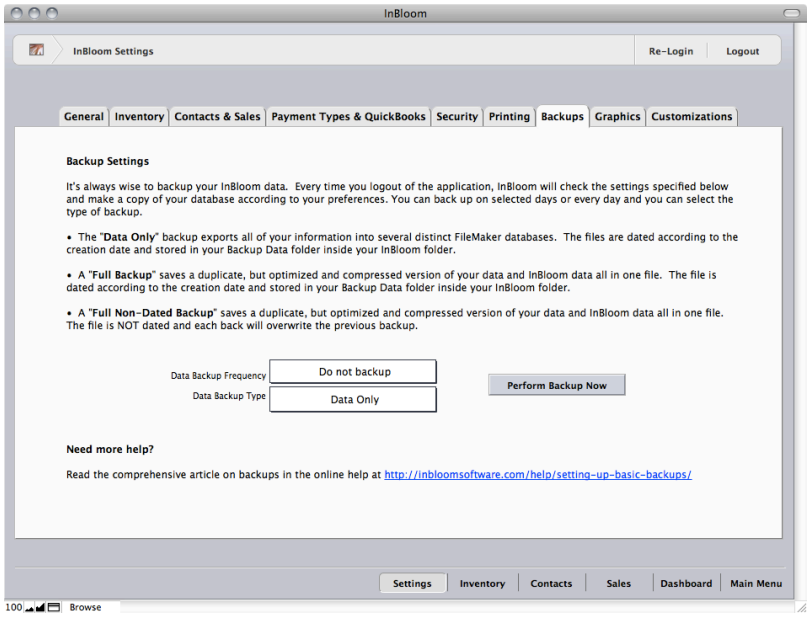

InBloom
InBloom Settings
Re-Login
Logout
General
Inventory
Contacts & Sales
Payment Types & QuickBooks
Security
Printing
Backups
Graphics
Customizations
Printing Choices
Place a checkmark next to all the groups you would like to grant permissions to for specific program features
Of Sales Receipts To Print
Sales Receipt:
Sales Receipt – Default Style 3"x9"
Credit Receipt:
Inventory Credit Receipt – Default Style
Layaway Receipt:
Layaway Receipt – Default Style
Return Receipt (sales):
Return Receipt – Default Style
Promo Receipt:
Promo Receipt – Default Style
Inventory Price Tags:
Label – Dymo 30336
Payment Check:
Check 9209
Condensed Payment Check:
Check 9209 – Multipage
Blank Inventory:
Blank Contract
Full Inventory:
Full Contract
Status Report:
Status Report
Consignor Return Receipt:
Inventory Return Receipt – Default Style
Single Mailing Label:
Mailing Labels – Dymo 30336
Bulk Mailing Label:
Mailing Labels Bulk – Avery 5160 Sheets
Consignment Terms & Conditions:
1. Consignor agrees to leave items for 90 days
2. Consignor will pick up items before 100 days from when items are dropped off
3. Consignor agree that unsold items left after 100 days will be donated to charity
4. These are sample consignment terms & conditions which are entered in the Settings module under Printing
5. You have basic text control and can format text using bold, italicized and underline formatting.
6. Advanced formatting of printouts requires Filemaker Pro.
7. If you have any additional questions about formatting, please email us at support@inbloomsoftware.com
Thanks!
Settings
Inventory
Contacts
Sales
Dashboard
Main Menu
Browse

The Printing tab lets you easily select the templates used for printing contracts, receipts, and more. For each of the print types, you can choose the template that will be used for printing. In addition, you can specify the number of copies of sales receipts that will print at the completion of each transaction.

You can also specify the Consignment Terms & Conditions which are merged onto the Blank Inventory and Full Inventory printouts.


InBloom
CONSIGNMENT AGREEMENT
Two Times Too Resale
ACCOUNT #: 1000
DATE ACCEPTED: September 20, 2009
PICKUP DATE: December 19, 2009
DONATION:
DATE ITEM DESCRIPTION PRICE FEES DATE SOLD SOLD PRICE DATE PAID AMOUNT PAID
9/20/09 1 Levis Faded Blue Denim Boot-Cut Jeans 20.00
11/20/08 2 Gucci Black Cotton Skinny Jeans 40.00
11/20/08 3 Juicy Couture Pink Cotton Terry Cloth Zip-up Sweatershirt 24.99
11/20/08 4 Juicy Couture Neon Green Terry Cloth Sweatpants 24.99
11/20/08 5 Banana Rep. Brown Leather Cowboy Belt 20.00
11/20/08 6 Ann Taylor Black Leather Sandals w/Silk Rosettes & Bows 40.00
8/20/09 7 18th Century Brazilian Rosewood Sidetable 150.00
8/20/09 8 Aromatic Vanilla-scented Candle & Glass Candlabra 20.00
CONSIGNMENT TERMS:
CLIENT SIGNATURE
DATE
CONSIGNOR:
ADDRESS:
CONTACT INFO:

Backups

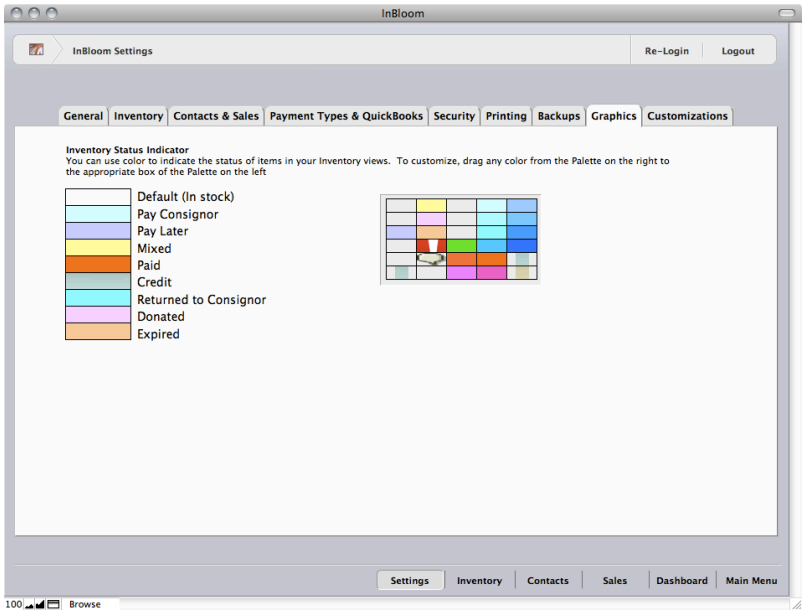

InBloom
InBloom Settings
Re-Login
Logout
General
Inventory
Contacts & Sales
Payment Types & QuickBooks
Security
Printing
Backups
Graphics
Customizations
Backup Settings
It's always wise to backup your InBloom data. Every time you logout of the application, InBloom will check the settings specified below and make a copy of your database according to your preferences. You can back up on selected days or every day and you can select the type of backup.
• The "Data Only" backup exports all of your information into several distinct FileMaker databases. The files are dated according to the creation date and stored in your Backup Data folder inside your InBloom folder.
• A "Full Backup" saves a duplicate, but optimized and compressed version of your data and InBloom data all in one file. The file is dated according to the creation date and stored in your Backup Data folder inside your InBloom folder.
• A "Full Non-Dated Backup" saves a duplicate, but optimized and compressed version of your data and InBloom data all in one file. The file is NOT dated and each back will overwrite the previous backup.
Data Backup Frequency
Do not backup
Data Backup Type
Data Only
Perform Backup Now
Need more help?
Read the comprehensive article on backups in the online help at http://inbloomsoftware.com/help/setting-up-basic-backups/
Settings
Inventory
Contacts
Sales
Dashboard
Main Menu
100
Browse

This tab lets you choose between the three different forms of automatic data backup that InBloom provides.

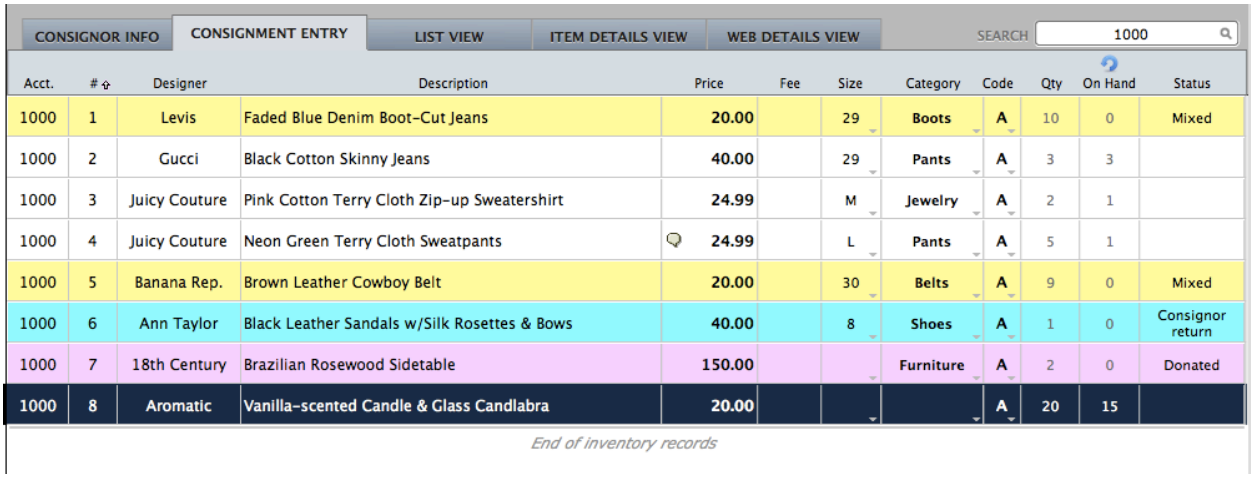
- A **Full Non-Dated Backup** saves a duplicate, but optimized and compressed version of your data all in one file; however, the file is NOT dated and each back will overwrite the previous backup.
- A **Full Backup** saves a duplicate, but optimized and compressed version of your data all in one file. The file is dated according to the creation date and stored in your Backup Data folder inside your InBloom folder.
- The **Data Only** backup exports all of your information into several distinct FileMaker databases. The files are dated according to the creation date and stored in your Backup Data folder inside your InBloom folder.

Note: We recommend all users use the Full Backup option for saving duplicates of their data. Read the The Basics of Backing Up Your Data section for more info.

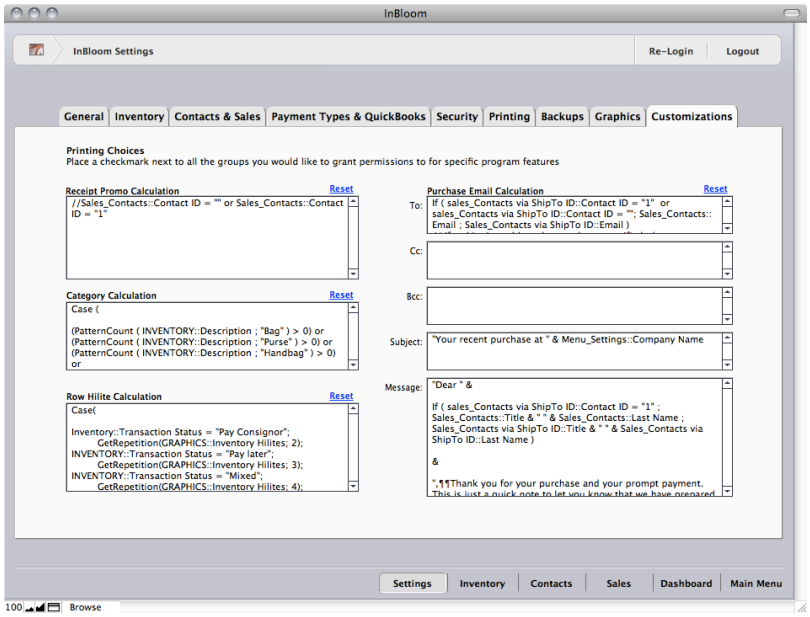
Graphics



You can use the Graphics tab to adjust the Inventory status visual highlighting, using color to indicate the status of items in your Inventory views. To customize the status color, simply drag or cut and paste any color or swatch from the palette on the right to the appropriate box of the palette on the left hand side. An example of color customization is shown below.


CONSIGNOR INFO
CONSIGNMENT ENTRY
LIST VIEW
ITEM DETAILS VIEW
WEB DETAILS VIEW
SEARCH
1000
Acct. # Designer Description Price Fee Size Category Code Qty On Hand Status
1000 1 Levis Faded Blue Denim Boot-Cut Jeans 20.00 29 Boots A 10 0 Mixed
1000 2 Gucci Black Cotton Skinny Jeans 40.00 29 Pants A 3 3
1000 3 Juicy Couture Pink Cotton Terry Cloth Zip-up Sweatershirt 24.99 M Jewelry A 2 1
1000 4 Juicy Couture Neon Green Terry Cloth Sweatpants 24.99 L Pants A 5 1
1000 5 Banana Rep. Brown Leather Cowboy Belt 20.00 30 Belts A 9 0 Mixed
1000 6 Ann Taylor Black Leather Sandals w/Silk Rosettes & Bows 40.00 8 Shoes A 1 0 Consignor return
1000 7 18th Century Brazilian Rosewood Sidetable 150.00 Furniture A 2 0 Donated
1000 8 Aromatic Vanilla-scented Candle & Glass Candlabra 20.00 A 20 15
End of inventory records

Customizations



The Customization tab lets your program various conditions and responses for specific parts of InBloom, such as printing promotional receipts after every sales transaction, auto-specifying the Category of inventory as you type, and generating pre-configured shipment emails when preparing a sales transaction with shipping.

Managing these customizations requires some familiarity with FileMaker Pro and the calculations FileMaker can interpret. You can click the Reset button next to any of the customizable fields to insert a working sample calculation that can be further customized for your business needs.

For example, to have a promotional receipt print after each sales transaction, enter the following code in the Receipt Promo Calculation field:

```
Sales_Contacts::Contact ID = "" or Sales_Contacts::Contact ID = "1"
```

This means that if no Buyer is specified when writing up a sale, InBloom will print a promotional receipt to your receipt printer. The promotional receipt is specified under the Printing tab and can be customized using FileMaker Pro - see the chapter on Customizing Printouts.

Shipment emails can be sent when writing up a sale. For an example of how a shipment email is formatted, use the template provided below for the various components of the Purchase Email Calculation:

To:	`If ( sales_Contacts via ShipTo ID::Contact ID = "1" or sales_Contacts via ShipTo ID::Contact ID = ""; Sales_Contacts::Email ; Sales_Contacts via ShipTo ID::Email )`
	
	`// If a shipping address has not been specified, then we try to use the Buyer contact's email`

Subject:	`"Your recent purchase at " & Menu_Settings::Company Name`

Message:	"Dear " & If (Sales_Contacts via ShipTo ID::Last Name = "" ; Sales_Contacts::Title & " " & Sales_Contacts::Last Name ; Sales_Contacts via ShipTo ID::Title & " " & Sales_Contacts via ShipTo ID::Last Name) & ",¶¶Thank you for your purchase and your prompt payment. This is just a quick note to let you know that we have prepared and shipped your recent purchase via " & Sales_Sales::Shipment Method & ".¶¶" & "You can track your package online " & Case (PatternCount (Sales_Sales::Shipment Method ; "USPS") > 0; "at USPS.com " ; PatternCount (Sales_Sales::Shipment Method ; "FedEx") > 0; "at Fedex.com " ; PatternCount (Sales_Sales::Shipment Method ; "UPS") > 0; "at UPS.com " ; "") & "using tracking number " & Sales_Sales::Shipment Tracking Number & ".¶¶" & "Thank you for shopping with us and enjoy your purchase!¶¶Best,¶" & Menu_Settings::Company Name

Here's the result of that calculation

To:	janet@smith.com
Subject:	Your recent purchase at Two Time Too Resale

Message:	Dear Ms. Smith, Thank you for your purchase and your prompt payment. This is just a quick note to let you know that we have prepared and shipped your recent purchase via USPS Priority Mail. You can track your package online using tracking number #1234567889 at USPS.com . Thank you for shopping with us and enjoy your purchase! Best, Two Times Too Resale

The Category Calculation

You can use this calculation to auto-enter categories for you based on any criteria you type when adding new Inventory. InBloom comes with a lengthy pre-configured calculation that is designed for the Categories already included. If you would like to modify it, we recommend copying the whole calculation in the Category Customization field, pasting it into a simple text editor program (like Text Edit on a Mac or WordPad on PC) and edit the calculation there. Once complete, copy and paste it back into the Category Customization field. The example calculation is somewhat lengthy but a shorter version is included below:

```
Case (

(PatternCount ( INVENTORY::Description ; "Bag" ) > 0) or
(PatternCount ( INVENTORY::Description ; "Purse" ) > 0) or
(PatternCount ( INVENTORY::Description ; "Handbag" ) > 0) or
(PatternCount ( INVENTORY::Description ; "minaudiere" ) > 0) or
(PatternCount ( INVENTORY::Description ; "tote" ) > 0) or
(PatternCount ( INVENTORY::Description ; "clutch" ) > 0) or
(PatternCount ( INVENTORY::Description ; "Bag" ) > 0) or
```

```
(PatternCount ( INVENTORY::Description ; "travel case" ) > 0);
"Bags" ;

(PatternCount ( INVENTORY::Description ; "Belt" ) > 0) ;
"Belts" ;

(PatternCount ( INVENTORY::Description ; "Blouse" ) > 0) ;
"Blouses" ;

(PatternCount ( INVENTORY::Description ; "Boot" ) > 0) ;
"Boots" ;

(PatternCount ( INVENTORY::Description ; "bracelet" ) > 0) ;
"Bracelets" ;

(PatternCount ( INVENTORY::Description ; "coat" ) > 0) or
(PatternCount ( INVENTORY::Description ; "parka" ) > 0) or
(PatternCount ( INVENTORY::Description ; "cape" ) > 0) or
(PatternCount ( INVENTORY::Description ; "trench" ) > 0) ;
"Coats" ;

(PatternCount ( INVENTORY::Description ; "dress" ) > 0) ;
"Dresses" ;

(PatternCount ( INVENTORY::Description ; "fur" ) > 0) ;
"Furs" ;

(PatternCount ( INVENTORY::Description ; "hat" ) > 0) ;
"Hats" ;

(PatternCount ( INVENTORY::Description ; "glasses" ) > 0) or
(PatternCount ( INVENTORY::Description ; "sunglasses" ) > 0) or
(PatternCount ( INVENTORY::Description ; "eyeglass" ) > 0);
"Glasses & Sunglasses" ;

(PatternCount ( INVENTORY::Description ; "gloves" ) > 0) or
(PatternCount ( INVENTORY::Description ; "mittens" ) > 0)  ;
"Gloves" ;

(PatternCount ( INVENTORY::Description ; "gown" ) > 0) ;
"Gowns" ;

(PatternCount ( INVENTORY::Description ; "bolero" ) > 0) or
(PatternCount ( INVENTORY::Description ; "blazer" ) > 0) or
(PatternCount ( INVENTORY::Description ; "jacket" ) > 0) ;
"Jackets" ;

(PatternCount ( INVENTORY::Description ; "necklace" ) > 0) or
(PatternCount ( INVENTORY::Description ; "earring" ) > 0) or
(PatternCount ( INVENTORY::Description ; "ring" ) > 0)  or
(PatternCount ( INVENTORY::Description ; "choker" ) > 0) or
(PatternCount ( INVENTORY::Description ; "pin " ) > 0) or
(PatternCount ( INVENTORY::Description ; "bangle" ) > 0) or
```

```
(PatternCount ( INVENTORY::Description ; "watch" ) > 0) or
(PatternCount ( INVENTORY::Description ; "pendant" ) > 0);
"Jewelry" ;

(PatternCount ( INVENTORY::Description ; "bra" ) > 0) or
(PatternCount ( INVENTORY::Description ; "robe" ) > 0) or
(PatternCount ( INVENTORY::Description ; "lingerie" ) > 0)  ;
"Lingerie" ;

(PatternCount ( INVENTORY::Description ; "pant suit" ) > 0) or
(PatternCount ( INVENTORY::Description ; "pantsuit" ) > 0)  ;
"Pant Suits" ;

(PatternCount ( INVENTORY::Description ; "pants" ) > 0) or
(PatternCount ( INVENTORY::Description ; "slacks" ) > 0) or
(PatternCount ( INVENTORY::Description ; "capris" ) > 0) or
(PatternCount ( INVENTORY::Description ; "jeans" ) > 0)  ;
"Pants" ;

(PatternCount ( INVENTORY::Description ; "scarf" ) > 0) or
(PatternCount ( INVENTORY::Description ; "pochette" ) > 0) or
(PatternCount ( INVENTORY::Description ; "pareo" ) > 0) or
(PatternCount ( INVENTORY::Description ; "shawl" ) > 0)  ;
"Scarves" ;

(PatternCount ( INVENTORY::Description ; "shoe" ) > 0) or
(PatternCount ( INVENTORY::Description ; "stiletto" ) > 0) or
(PatternCount ( INVENTORY::Description ; "pump" ) > 0) or
(PatternCount ( INVENTORY::Description ; "loafer" ) > 0) or
(PatternCount ( INVENTORY::Description ; "sandal" ) > 0) or
(PatternCount ( INVENTORY::Description ; "sneaker" ) > 0) or
(PatternCount ( INVENTORY::Description ; "mule" ) > 0) or
(PatternCount ( INVENTORY::Description ; "slide" ) > 0) or
(PatternCount ( INVENTORY::Description ; "slingback" ) > 0) or
(PatternCount ( INVENTORY::Description ; "flats" ) > 0) or
(PatternCount ( INVENTORY::Description ; "maryjane" ) > 0) or
(PatternCount ( INVENTORY::Description ; "mary jane" ) > 0) or
(PatternCount ( INVENTORY::Description ; "moccasin" ) > 0) or
(PatternCount ( INVENTORY::Description ; "skimmer" ) > 0) or
(PatternCount ( INVENTORY::Description ; "oxfords" ) > 0);
"Shoes" ;

(PatternCount ( INVENTORY::Description ; "skirt suit" ) > 0) or
(PatternCount ( INVENTORY::Description ; "skirtsuit" ) > 0)  ;
"Skirt Suits" ;

(PatternCount ( INVENTORY::Description ; "shirt" ) > 0) ;
"Shirts" ;

(PatternCount ( INVENTORY::Description ; "sweater" ) > 0) or
(PatternCount ( INVENTORY::Description ; "cardigan" ) > 0) or
(PatternCount ( INVENTORY::Description ; "twinset" ) > 0) or
(PatternCount ( INVENTORY::Description ; "vest" ) > 0) or
```

```
(PatternCount ( INVENTORY::Description ; "twin set" ) > 0) ;
"Sweaters" ;

(PatternCount ( INVENTORY::Description ; "skirt" ) > 0) ;
"Skirts" ;

(PatternCount ( INVENTORY::Description ; "top" ) > 0) or
(PatternCount ( INVENTORY::Description ; "tunic" ) > 0) or
(PatternCount ( INVENTORY::Description ; "turtleneck" ) > 0) or
(PatternCount ( INVENTORY::Description ; "camisole" ) > 0) or
(PatternCount ( INVENTORY::Description ; "tank" ) > 0) or
(PatternCount ( INVENTORY::Description ; "polo" ) > 0) or
(PatternCount ( INVENTORY::Description ; "t-shirt" ) > 0) or
(PatternCount ( INVENTORY::Description ; "shell" ) > 0);
"Tops" ;

(PatternCount ( INVENTORY::Description ; "shearling" ) > 0) ;
"Shearling" ;

(PatternCount ( INVENTORY::Description ; "tie" ) > 0) ;
"Tie" ;

(PatternCount ( INVENTORY::Description ; "pencil" ) > 0) or
(PatternCount ( INVENTORY::Description ; "perfume" ) > 0) or
(PatternCount ( INVENTORY::Description ; "cologne" ) > 0)  or
(PatternCount ( INVENTORY::Description ; "nail enamel" ) > 0) or
(PatternCount ( INVENTORY::Description ; "nail polish" ) > 0) or
(PatternCount ( INVENTORY::Description ; "lipstick" ) > 0) or
(PatternCount ( INVENTORY::Description ; "balm" ) > 0) or
(PatternCount ( INVENTORY::Description ; "shampoo" ) > 0) or
(PatternCount ( INVENTORY::Description ; "conditioner" ) > 0) or
(PatternCount ( INVENTORY::Description ; "blush" ) > 0) or
(PatternCount ( INVENTORY::Description ; "gel" ) > 0) or
(PatternCount ( INVENTORY::Description ; "creme" ) > 0);
"Make-up" ;

""
)
```

Managing InBloom Users

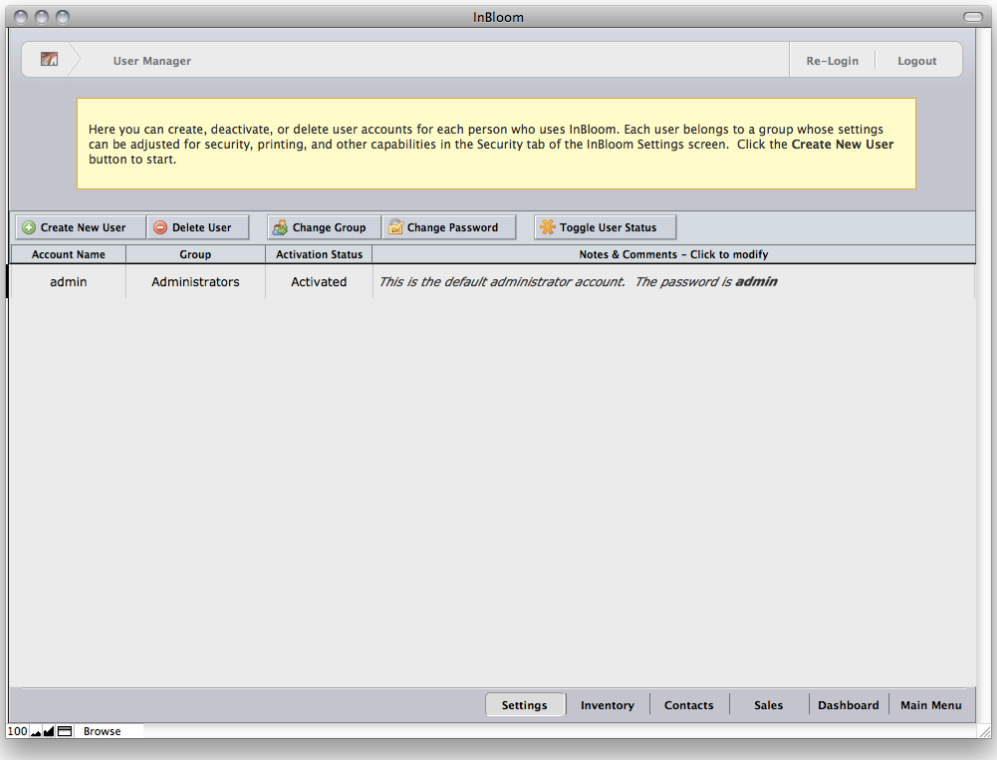
Adding & Managing InBloom Users

InBloom features easy to manage security settings through the use of Users and Groups. The number and name of groups can not be modified. They are:

- **Administrators**
- **Supervisors**
- **Managers**
- **Users**

Each group has the same level of abilities except for the Administrator group, by default. You can modify these abilities and permissions at any time when using InBloom - see the previous section on the Security tab of the Settings Module for more info.

To begin creating, activating/deactivating, or deleting users from your copy of InBloom, by navigating to the Main Menu. Click the **Show All** button to display the Other Options screen, then click on the **Users** button to display the User Management screen (shown below).

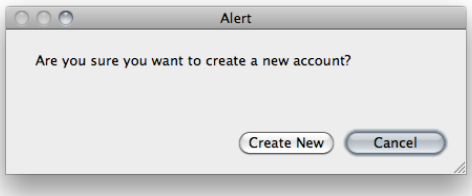


This screen displays a list of all users, each user's Group setting, and the Activation Status of each username.

The toolbar at the top of the list offers different user administration functionality, such as creating Users, deleting Users, changing Groups, changing Permissions, and toggling Activation Status.

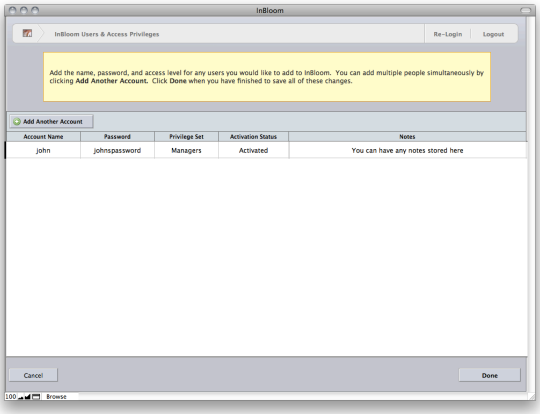
To Create A New User:

Click the **Create New User** button in the toolbar



In the next popup dialog, confirm that you want to create users by clicking the **Create New** button

In the user creation screen, enter an Account Name, Password, Privilege Set, Activation Status, and any notes for the username and password.



You can add multiple new users on this screen by clicking **Add Another Account** in the toolbar

When you're ready to finish, click the **Done** button on the bottom right.

Using Find Mode

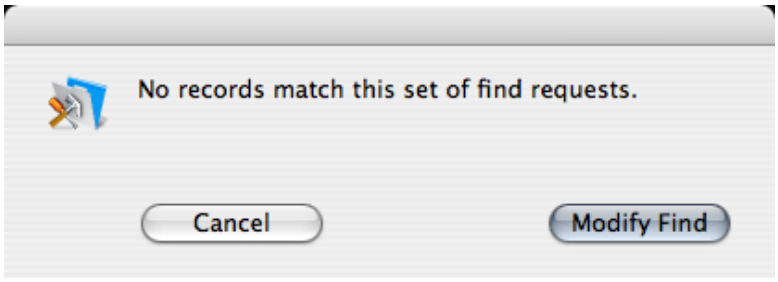
An Introduction To Find Mode

InBloom features exceptional searching functionality as being able to find data is just as important as the process of entering it in. Searching allows you to isolate a set of records within InBloom - this set of records is commonly called **the found set**.

Find Mode is a type of setting whereby you are in a search specific environment, allowing you to enter the search criteria, execute the search, and display the matching records. Depending on what you search for, InBloom will return one of two results:

InBloom finds what you were looking for and isolates those records into the found set. You can then browse the found set using the interface for moving through the inventory records.

InBloom does NOT find what you were looking for and displays a No Records Found dialog box (shown below) and gives you the options of exiting Find Mode or modifying the search criteria.



The No Records Found Dialog

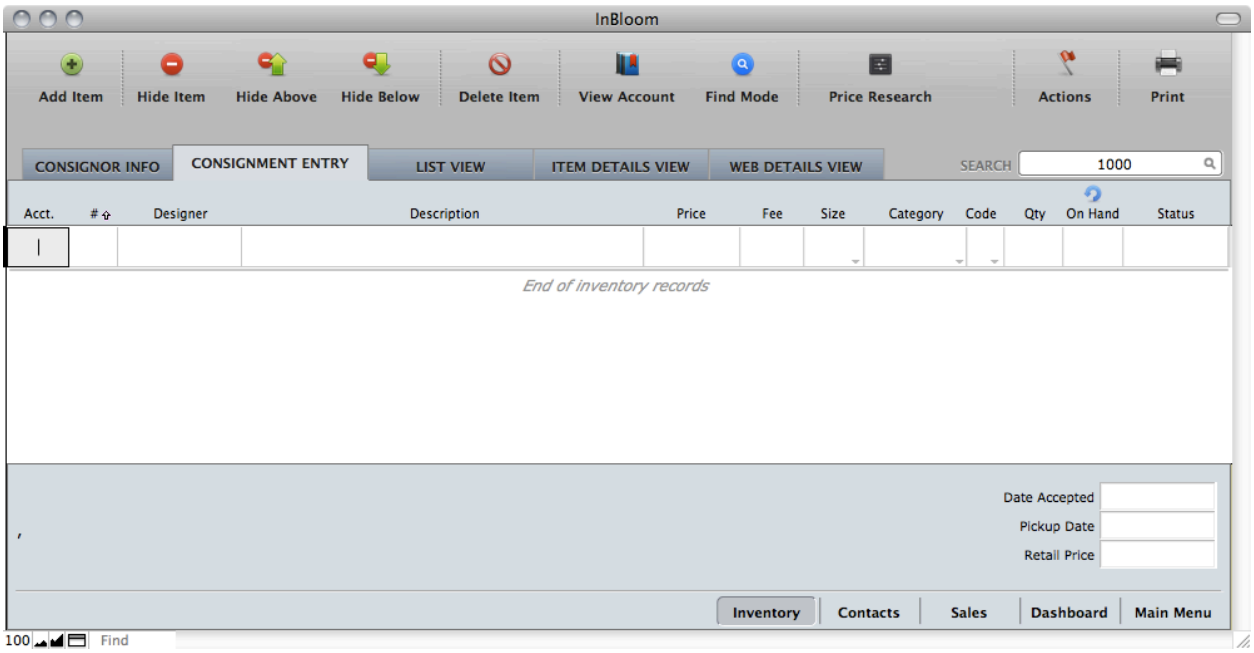
Using QuickSearch To Find Items

The QuickSearch field is available on all inventory and contact screens on the top right corner. You can use it to enter any descriptive information or keywords stored in the Account Number, Item Number, Designer, and Description fields, much like having a web search engine like Google but for your inventory items. QuickSearch is perfect for searching with names, numbers, and keywords without separating the parts of your search criteria.

Simply type your search criteria such as "black jeans" or "pine armoire" and hit the Enter key on your keyboard. Any matching records will be immediately displayed in the same window. You can also use this to quickly search for accounts e.g. searching for account "1900", or searching for a range of items e.g. "1900-120...150" will search and display inventory items 120 through 150 in account 1900.

Using Find Mode To Find Items

You can also find inventory in InBloom by using the powerful Find Mode. Enter Find Mode by clicking the **Find Mode** button on the top toolbar or by clicking the **Find Items** button on the Main Menu. Entering Find Mode clears the display of any records (it looks as though you have a blank record) and enters the currently selected field awaiting search criteria *(following image)*.



The Consignment Entry View in Find Mode

In order to search for specific criteria, you type the value or values to find into fields in a find request. When you perform the find, InBloom searches for records that match the criteria you entered.

For example, if you would like to find all items whose Designer is "Gucci", simply enter find mode, enter the Designer field, type Gucci and click the Find button on the left hand side or hit the Enter key on your keyboard. InBloom will display any records where the Designer field

If you would like to perform a different find request on the same data, you can go to the Window menu and choose the New Window menu item to open another window which will operate independently of other windows.

Finding Items Redux

InBloom uses powerful find capabilities to allow you to perform many different kinds of finds, such as:

- Finding text and certain characters
- Finding numbers, dates, times, and timestamps
- Finding ranges of information
- Finding empty or non-empty values
- Finding records that match multiple criteria
- And more...

Performing these different kinds of finds involves using specific operators to represent the kind of search you would like to perform while finding records that match multiple criteria will usually involve multiple find requests.

Finding Records That Match Multiple Criteria

To begin, start a find request as noted on the previous page, then narrow your search by entering in as many fields as needed to make your find request specific, then click Find/Continue or hit the Enter key on the keyboard. This is called a logical AND search.

For example, if you would like to find all Gucci black jeans under $100, you would enter Find Mode, enter Gucci in the Designer field, enter black jeans in the Description field and enter < 100 in the Price field. Hit the Enter key on your keyboard to perform the search.

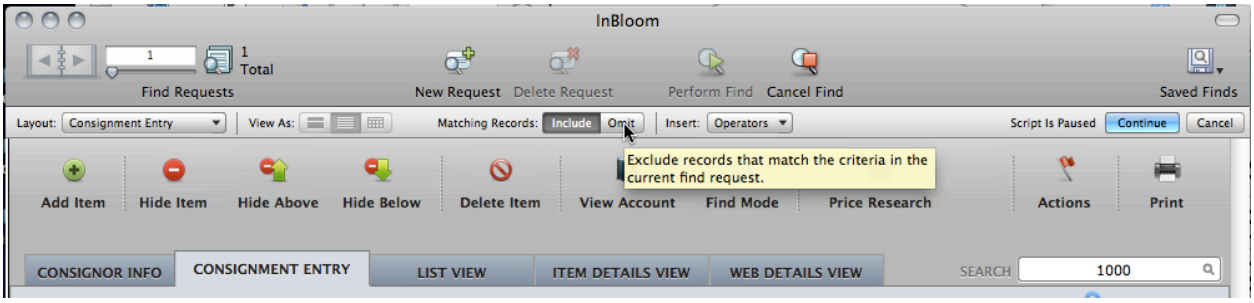
You can add multiple Find requests together to generate specific found sets of practically any group of records.

For example, if you would like to find all Gucci black jeans under $100 AND all Calvin Klein jeans under $100, you would enter find mode, enter Gucci in the Designer field, enter black jeans in the Description field and enter < 100 in the Price field. Then, choose the Requests menu and choose Add New Request and enter the second set of criteria: enter Calvin Klein in the Designer field, enter black jeans in the Description field and enter < 100 in the Price field. Hit the Enter key on your keyboard to perform the search.

Find Records That Match One Set Of Criteria But Not Another

You can exclude (omit) records while performing a find. In other words, you can find information in your database that "does not equal" your specified criteria. For example, you can find all items except those whose designer is Gucci.

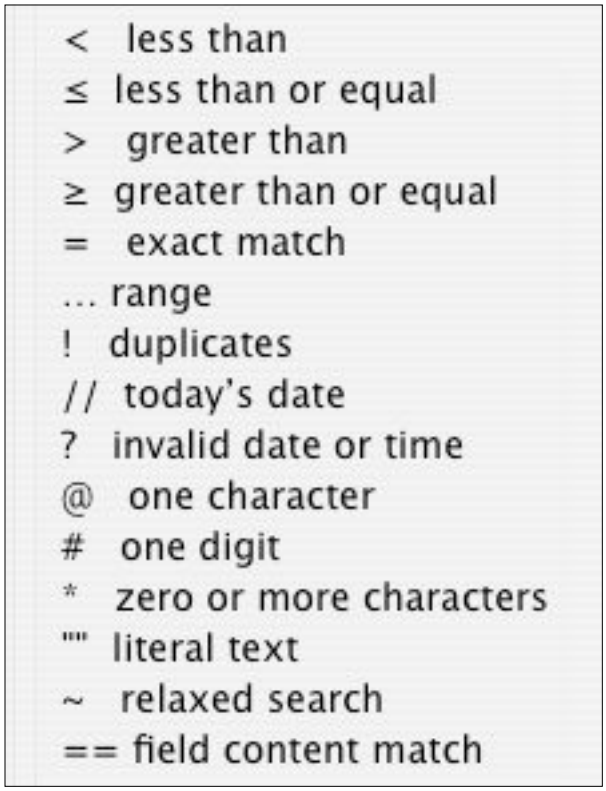
For example, if you would like to find all items in the inventory except Gucci, enter Find Mode, then type Gucci into the Designer field, then select the Omit button on the top toolbar (following image). Hit the Enter key on your keyboard to perform the search.



The Omit Button

Search Operators

Following is a list of all of the search operators that can be used in Find Mode to narrow down a particular set of records.



< Less Than

Finds all the records that are less than what you specified.

≥ Less Than Or Equal

Finds all the records that are less or equal to a value that you specified.

> Greater Than

Finds all the records that are greater than what you specified.

≤ Greater Than Or Equal

Finds all the records that are greater than or equal to a value that you specified.

= *Exact Match*

Searches for each full word match for each word specified. Without the operator, a search for Bob would return records of Bob Jones, Bob Williams and Billy Bobbett. If you did a search using the exact operator (= Bob) then your search would return Bob Jones and Bob Williams. Billy Bobbett would not be found when using the exact match search operator.

... *Range*

This is used to find the matching records between two values in a particular field. This is most useful when dealing with numbers, date and time fields. If you were to go into Find Mode and type 10...20 as your find setting and execute the find, you would find the records with values between 10 and 20 (including 10 and 20). For example, you might get records with values of 11, 15 and 20.

! Duplicates

This is used to find records that have exactly matching data within the search field. The found set will have all the duplicates (original and following matches). A common use is to find duplicate contact records in an address type of database. This can happen via data entry errors or perhaps a recent import of data. You want to make sure you don't do a find for duplicates and delete the found set. That would delete the original records as well. There are a number of ways to

isolate the original record from the duplicates by using relationships and calculation fields.

// Today's Date

This is a quick and easy way to find records that have a date value that exactly matches the date in the computers memory.

? Invalid Date or Time

By default, FileMaker does not allow a user to enter in invalid data into a date or time field. FileMaker will bark at you if you try. However, you can enter invalid information into a date or time field with scripts or via imports. So we now know that invalid data is possible in these fields. This invalid data can cause a variety of problems with your database solution. So you can use the ? operator to find any invalid data you might have. Then you can work to correct the problem records.

NOTE: You might have seen the ? character in your date fields right after running a script step that sets a date field to "". You can fix this by using the set script to set the field equal to TextToDate("") and the ? will now appear.

@ One Character

This is used to put a wildcard character into one character space that makes up part of a search setting. For example, a search for Mo@ could return Mom, Moe or Mod. This means any character could take

the place of the @ character. However, only one character is all that can be replaced. Records with moon, move or moot would not be found because of the one wild character limitation.

* Zero Or More Characters

This is one of your more "taking a blind stab at it" type of search operators. This will find matches for the wildcard for zero or more characters. So a search for Mo* would return matches such as Mo, Moe, Modern and Moomoo.

"" Literal Text

This is used when you are searching for a literal string of text pieces. So a search on LeSaux Media Services would not find LeSaux Media Services Inc. However since we are talking about string pieces, it would find LeSaux Media Services, Media Services LeSaux or Services Media LeSaux. This is because all the matching strings are there. When you really want the exact match as entered, you go for the Field Content Match search operator.

== Field Content Match

This is used for finding exact matches to what you typed in your search settings. The match will only find the exact same words (no more or less) in the exact order you entered them.

NOTE: For case sensitivity when searching for text information, you will need to index the field in ASCII (see indexing discussion for details).

Customizing Printouts

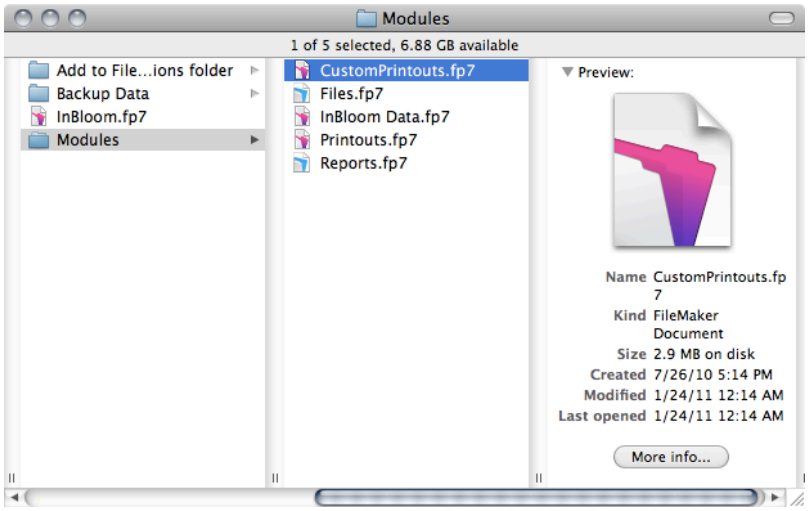
A Brief How-To Guide

You can easily start customizing any of the InBloom printout templates to your preference. This requires a little bit of familiarity with FileMaker Pro's layout capabilities but is nonetheless, fairly straightforward.

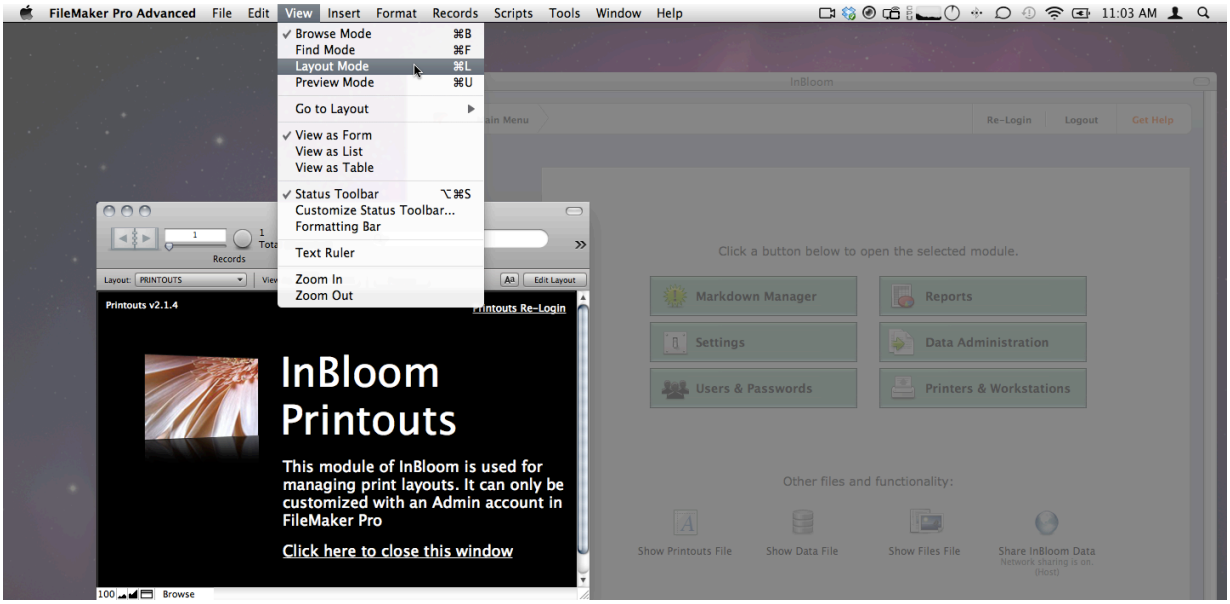
Note: InBloom Lite users can not modify their printouts as noted below, unless they use FileMaker Pro to temporarily edit the file. Thus, you can even download and use a 30-day trial of FileMaker from FileMaker.com to make modifications and once the FileMaker trial expires, your printout customizations will still work fully.

To begin:

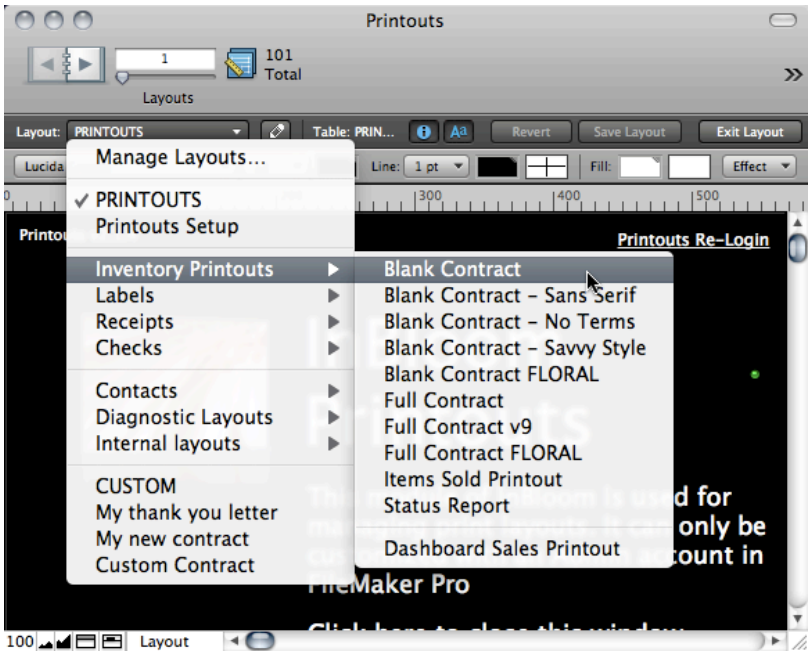
- Logout of InBloom
- Go to the folder on your computer where you installed InBloom
- Within the InBloom folder, open your **Modules** folder
- Find the file named **Printouts.fp7**
- Create a duplicate of the Printouts file, using right click and Duplicate on a PC, or go to the File menu in the Finder on a Mac and choose Duplicate.
- Rename the duplicate file to **CustomPrintouts.fp7** (note there is no space between any letters)



- Now re-open InBloom as you would normally
- From the Main Menu, click Other Modules, then click Show Printouts File
- In the Printouts window that opens, choose Printouts Re-Login from the top right corner
- Enter the username: **admin**
- Enter the password: **admin**
- Go to the View menu in the menubar at the top, choose **Show Status Toolbar**
- Go again to the View menu in the menubar and choose **Layout Mode**



- Click on the Layout pulldown menu that currently says PRINTOUTS
- You'll see a series of layouts you can modify. Choose the layout template you would like to modify.



- Make all of your changes to the layout, save the changes, then test printing from within InBloom.
- Make sure that you have selected the layout you are modifying in the Printing settings (Main Menu > Other Modules > Settings > Printing

tab) *e.g. in the screenshot above, we are modifying the Blank Contract layout, make sure the Blank Inventory setting under the Printing tab is set to Blank Inventory.*

Note: InBloom Lite users can not modify their printouts as noted below, unless they use FileMaker Pro to temporarily edit the file. Thus, you can even download and use a 30-day trial of FileMaker from FileMaker.com to make modifications and once the FileMaker trial expires, your printout customizations will still work fully.

Advanced Printout Customization

InBloom has a number of helpful modifications to make including your customizations in InBloom easier to manage.

Print Settings For Each Print Layout

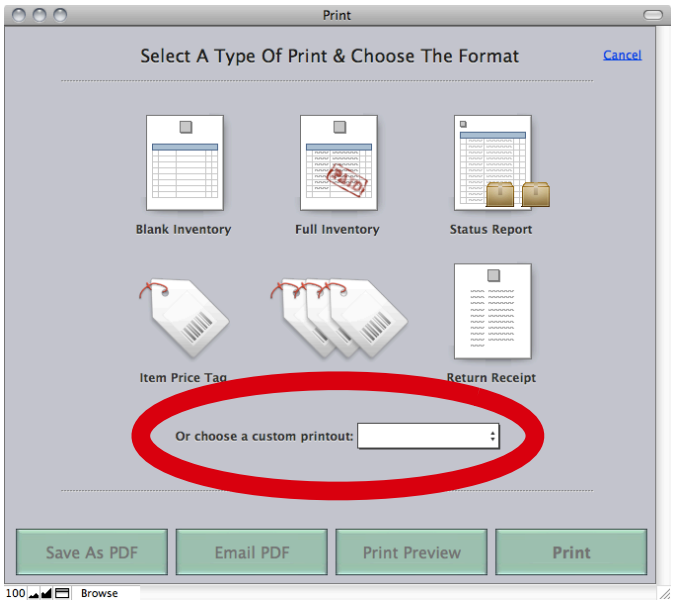
Because there are multiple page sizes, printer specifications, and page orientation variations for printouts, we've developed a shortcut which makes creating new layouts more straightforward. That shortcut is a Print Settings box placed on each print layout. The box has an object name of PrintSettings (as specified in the Position tab of the FileMaker Inspector palette) and contains five lines, each of which is used to preconfigure your printout before it is sent to the printer.

Customize lines 2–4 of this text box to adjust your print settings automatically. Line 2 must be **horizontal** or **vertical**, Line 3 must be **Document**, **Tag**, or **Receipt**, and Line 4 must be **All records** or **Current record**. This text box will not appear on printouts.
Horizontal
Tag
All records
30336

Here is a list of the instructions which can be passed to this layout:

- **Line 1:** Usually contains instructions and should be left blank if no instructions are included
- **Line 2:** The print orientation is specified as **Horizontal** or **Vertical**. This is used to specify whether to print the document in Landscape or Portrait mode respectively.
- **Line 3**: Specifies the printer type that InBloom should switch to. Three types can be passed on this line - **Tag**, **Document**, or **Receipt**.
- **Line 4**: Is deprecated and can be disregarded.

Custom Inventory Printouts

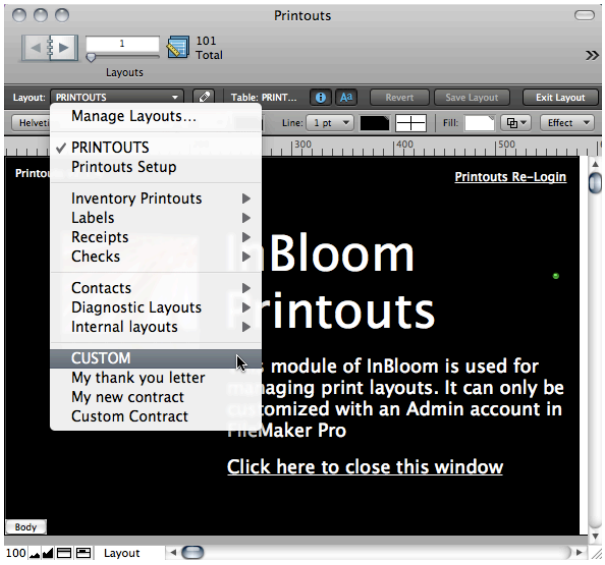


When printing inventory items and lists, you can specify a custom printout from the pulldown menu in the InBloom Print window. The options that populate this Custom Printout menu are specified in the

Printouts file based on layout order. Note that in the sample window above, there are three custom printouts available:

- **Custom Contract**
- **My new contract**
- and, **My thank you letter**

These correspond to the layouts in the Printouts file as shown on the right. Note that all of the layouts after the layout named CUSTOM are what appear in the printout menu.



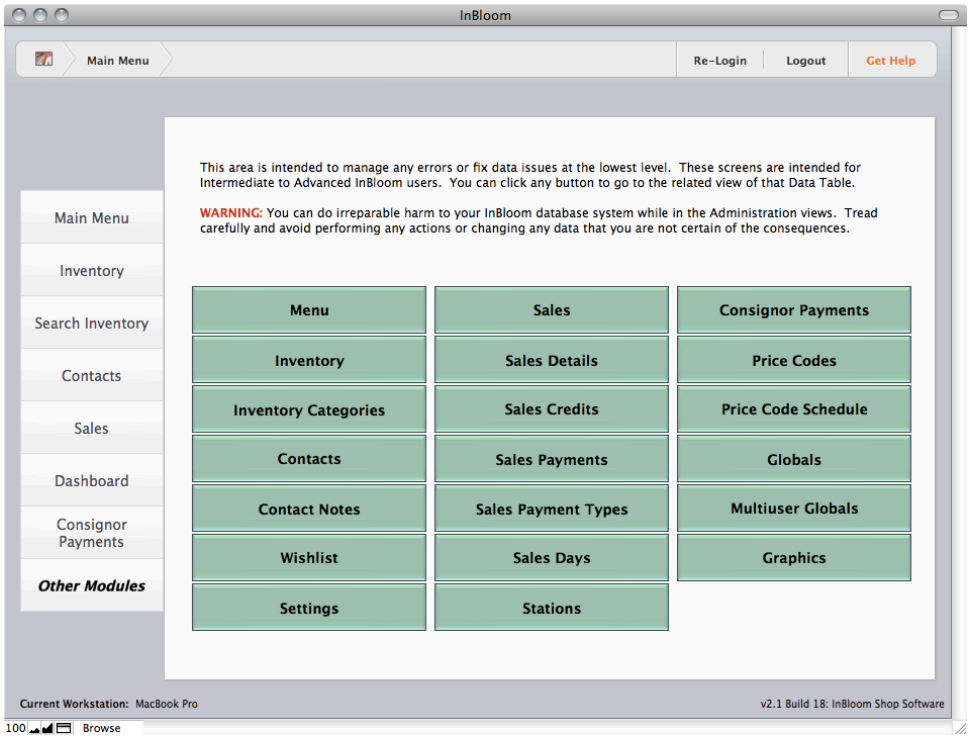
This functionality is useful if you have a special price tag, inventory list, or other form of printout you need to print on a custom basis rather than every time you print a contract within InBloom.

Undoing Printout Customizations

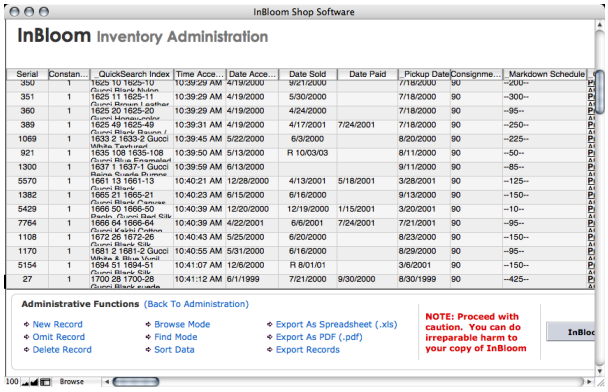
If you've made too many changes to your **CustomPrintouts.fp7** file and have possibly broken a printout, you can simply delete the file and create a new copy from the **Printouts.fp7** file. Note that you will lose ALL of your printout customizations when doing this, but you will have restored back to a fully working default.

Stuff Done Occasionally

Exporting Data To A Spreadsheet or PDF



InBloom gives high-level users nearly unlimited access to the full data being stored in various tables. These tables are listed by going to the Data Administration screen. You can reach this screen by going from the Main Menu, proceed to the Other Options screen, and click the Data Administration button.



Note: You can do irreparable harm to your copy of InBloom in the Data Administration screens. Proceed with caution and only perform an action when you are certain of the results.

Each individual data administration screen offers complete database maintenance features such as import, export, record creation, record deletion, browse mode, find mode, and more.

Exporting Info To A Spreadsheet or PDF

The Data Administration screens for each table also offer the ability to export data in a variety of different formats, most especially as a spreadsheet (.XLS), as Portable Document Format file (.PDF), and as a FileMaker file (.FP7). Simply choose the appropriate action from the footer of each Data Administration screen (right image) to begin the data export process.

The data export functionality is useful for performing advanced reporting functions using a separate program such as Microsoft Excel.

Sharing InBloom Data

The Share InBloom Data button on the Other Options screen is used only in networks of computers. This button turns FileMaker sharing on, InBloom sharing on, and refreshes the current list of networked FileMaker users.

Upgrading from InBloom Lite to InBloom Pro

If you've grown out of InBloom Lite and need networking and/or printout customization capabilities, you can upgrade from InBloom Lite to InBloom Pro in under a minute.

Your InBloom serial number works just the same for InBloom Pro as it does for InBloom Lite. You simply need a multiuser license to use InBloom with multiple computers. You can purchase the multi-user upgrade license from InBloomSoftware.com at any time.

You also need a unique copy of FileMaker Pro installed on each machine you'll be using concurrently. Feel free to email us at support@inbloomsoftware.com with any licensing questions before purchasing copies of FileMaker.

Upgrading then becomes a very quick process:

- Quit out of InBloom Lite
- Install FileMaker Pro on each computer
- Go to your InBloom folder and change the file extension for .IBL files to .FP7 - the following filenames are changed:
    1. InBloom.**IBL** → InBloom.**FP7**
    2. (in the Modules folder) InBloom Data.**IBL** → InBloom Data.**FP7**
    3. (in the Modules folder) Printouts.**IBL** → Printouts.**FP7**
    4. (in the Modules folder) Reports.**IBL** → Reports.**FP7**
    5. (in the Modules folder) Files.**IBL** → Files.**FP7**
- **You're done! From now on, you simply need to doubleclick InBloom.fp7 to open InBloom**

Troubleshooting

Questions & Answers

You can't login

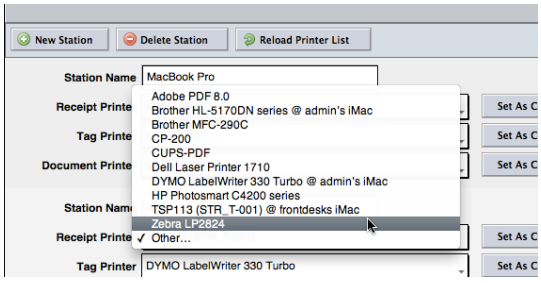
Make sure your username and password are typed with the proper case when logging in. The username and password were specified when you first set up InBloom, in Step 1 of the installation.

You can also try using "**admin**" as both the username and password. If you still can not get into InBloom, email InBloom support at support@inbloomsoftware.com with this issue and we can reset your password for you.

InBloom doesn't switch to the correct printer when printing

The printer InBloom chooses for printing is based on the current Workstation printer setting. First, make sure you are using the proper setting by verifying that the Workstation is set properly by checking the setting on the bottom left of the Main Menu. The Workstation is specified everytime you login to InBloom.

Next, make sure that the selected Workstation has the proper printer name. Note that InBloom expects the exact printer name so if there is a misspelling, this can cause issues when auto-switching printers. Go to



the Main Menu > Other Modules > Printers & Workstations > click on the setting for the particular printer and make sure it is available from the pulldown menu of available printers. If it is not, click Preload Printer List and select the printer again.

If the printer is not showing up in the pulldown menu, doublecheck that it is powered on, installed on your computer, and attached to your computer.

If you only see a question mark ("?") when viewing the printer menu, make sure you have installed the MyFMButlerPrinterSwitch plugin in the Extensions folder in your FileMaker Pro folder. This plugin is already included and installed for all InBloom Lite users.

Emailing through Gmail or other web-based emails

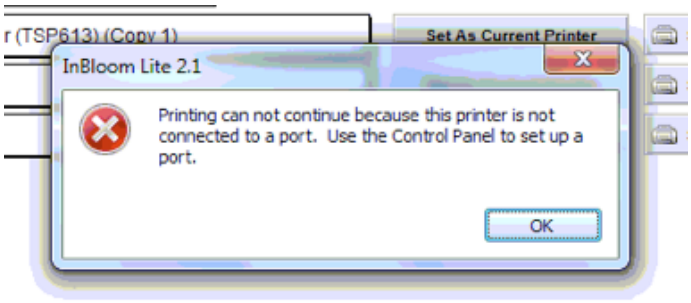
When InBloom generates emails, it uses the default native email program on your computer to compose the message and to attach PDFs of your printouts. By default, on Macs, that program is Apple Mail; on PCs, that program is Outlook Express or Windows Mail.

If you are using Gmail, Yahoo Mail, Hotmail, AOL, etc., you must have a email application on your computer set up to use these accounts. Otherwise, no email will be generated.

Note: you can have an email program set up on your system, only use it for customer emails and still use the web-based interface for your general email purposes.

InBloom error message "… the printer is not connected to a port"

After installing InBloom on Windows 7, this message can sometimes show up. It may show up because of several reasons and there are multiple solutions.


r (TSP613) (Copy 1)
Set As Current Printer
InBloom Lite 2.1
Printing can not continue because this printer is not connected to a port. Use the Control Panel to set up a port.
OK

Solution #1 - Run InBloom InBloom in Compatibility Mode

1. Completely quit InBloom Lite
2. Open your InBloom folder and right click on the InBloom Lite application
3. Choose the Properties option
4. Click on the Compatibility tab
5. Now, place a checkmark next to the "Run this program in compatibility mode for..." box and select Windows XP SP2 or SP3 as an option.

Solution #2 - Uninstall And Reinstall Your Printer Drivers

1. To begin, completely quit InBloom and/or FileMaker Pro
2. Go to the Start menu > Devices & Printers option in Windows
3. Highlight the problematic printer
4. Choose Remove Device from the toolbar
5. Once the printer has been removed, unplug the printer from your computer and replug it in.
6. Click Add Printer in the toolbar

7. Walk thru the install process and install the proper driver for your printer
8. Reconfigure the printer name in InBloom by going to Printers & Workstations (Main Menu > Other Modules > Printers & Workstations) and re-selecting the printer by name.
9. Repeat steps 3-8 for each problematic printer

Contact Us

Thank you for using InBloom Shop Software!

If you have any problems with the application, please visit our Web site at www.InBloomSoftware.com/support or write an e-mail to support@inbloomsoftware.com

For more information about InBloom products and services, visit our Web site at www.InBloomSoftware.com or e-mail us at sales@InBloomSoftware.com

InBloom Shop Software is designed by a team of developers and users led by Denis Somar of Secret Weapon Labs LLC, in New York City.

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